

This page Is Inserted by IFW Operations  
And is not part of the Official Record

## **BEST AVAILABLE IMAGES**

Defective images within this document are accurate representations of  
The original documents submitted by the applicant.

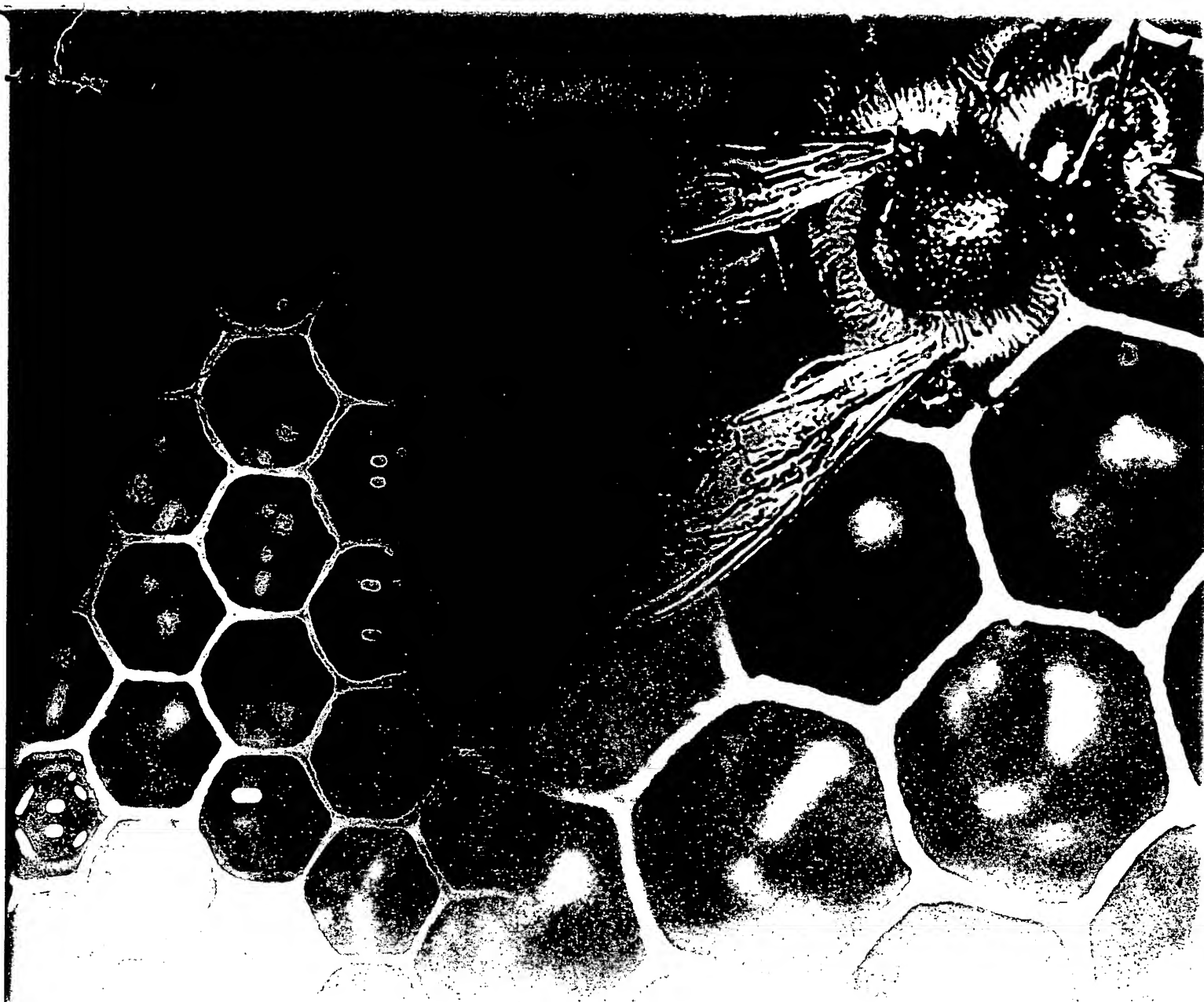
Defects in the images may include (but are not limited to):

- BLACK BORDERS
- TEXT CUT OFF AT TOP, BOTTOM OR SIDES
- FADED TEXT
- ILLEGIBLE TEXT
- SKEWED/SLANTED IMAGES
- COLORED PHOTOS
- BLACK OR VERY BLACK AND WHITE DARK PHOTOS
- GRAY SCALE DOCUMENTS

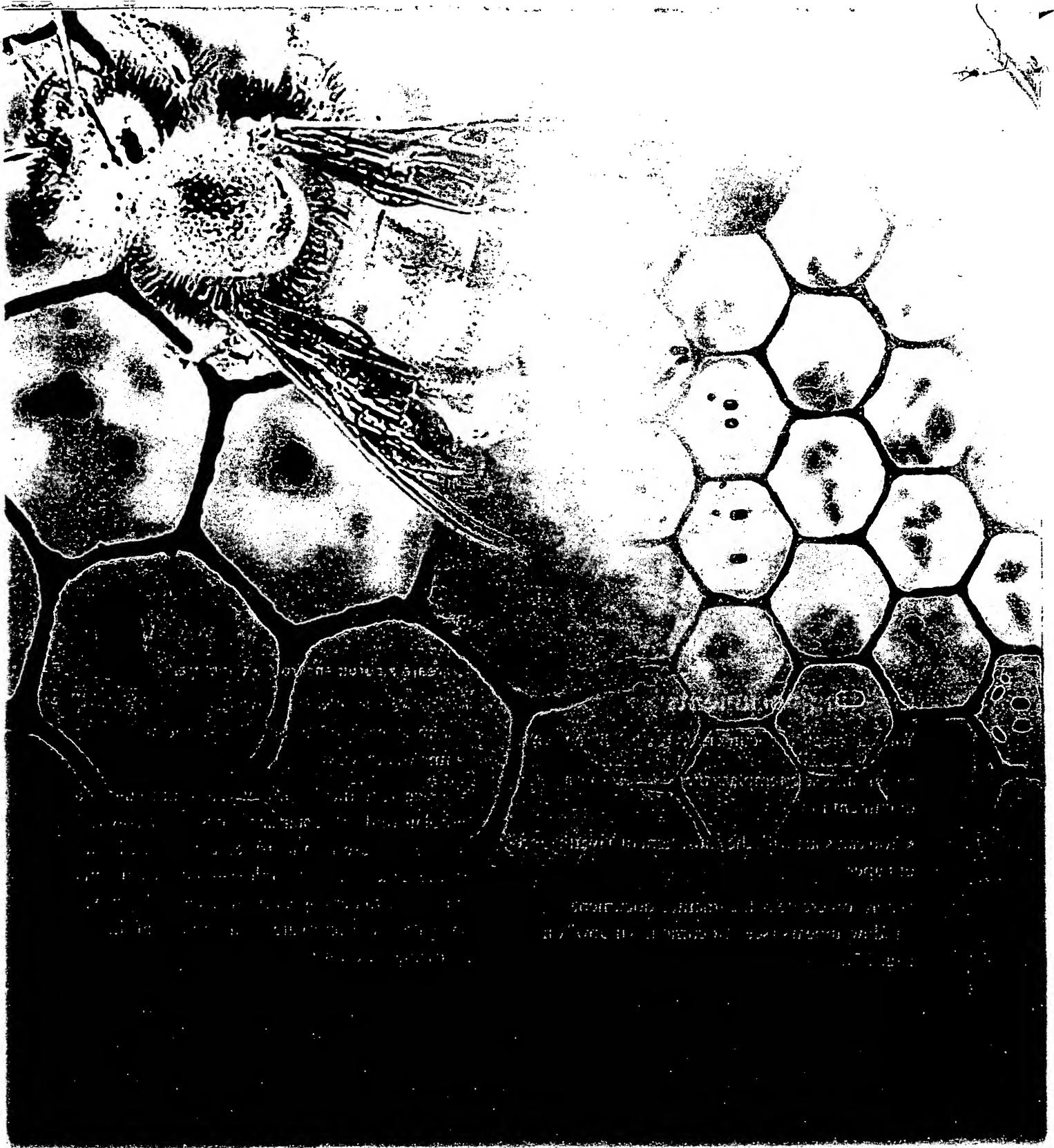
### **IMAGES ARE BEST AVAILABLE COPY.**

**As rescanning documents *will not* correct images,  
Please do not report the images to the  
Image Problem Mailbox.**

**THIS PAGE BLANK (USPTO)**



2





# Chapter 2: Working with FrameMaker Documents

**Y**ou'll need to know the basic procedures that apply to working with any FrameMaker document, including how to create and open documents, choose cross-platform compatibility options, and print, save, and close documents.

This chapter covers these basics and provides information on using the document window. For example, it discusses how to use the document window guides, zoom in and out, and display pages. It also describes how to use shortcuts for frequently used FrameMaker commands.

## Creating documents

You can create a document in the following ways:

- You can use a template that defines how a document looks.
- You can start with the equivalent of a blank piece of paper.

When you create a document, a document window appears (see “Document window” on page 37).

## Creating documents from templates

Templates are the foundation of the FrameMaker approach to document publishing. They affect every aspect of a document's appearance and help to keep that appearance consistent from one page to the next and from one document to another. FrameMaker comes with standard templates for letters, memos, reports, newsletters, outlines, books, and viewgraphs. However, you can use any document as a template. If the document contains text and graphics, you can delete them and then insert your own.

### To create a document from a template:


- 1 Choose File > New > Document. On UNIX systems, you can also click New in the main FrameMaker window.
- 2 Navigate to the document you want to use as a template (either the standard ones or your own). If you want to use a standard template—one in the FrameMaker Templates folder—but the contents of another folder appear in the New dialog box, navigate to the Templates folder in one of the following locations:

- (Windows and Macintosh) The FrameMaker folder

**Note:** On the Macintosh, the *Templates* folder may not appear when you choose *File > New > Document* if you have set the *General Controls* control panel to have applications automatically open the last folder used when opening or saving a document.

- (UNIX) The *fminit/language/Maker* folder within the FrameMaker installation folder (In the path above, replace *language* with the name of the language you're using—for example, *usenglish* or *ukenglish*.)

3 Select a template and click *New* (Windows and Macintosh) or *Create* (UNIX). The new, untitled document contains the formats and content from the template.

 To view information about the standard templates, choose *File > New > Document*, click *Explore Standard Templates*, and select a template in the scroll list. After viewing the information, click *Create* to create an empty document from the selected template, or click *Show Sample* to view a document that contains sample text and graphics.

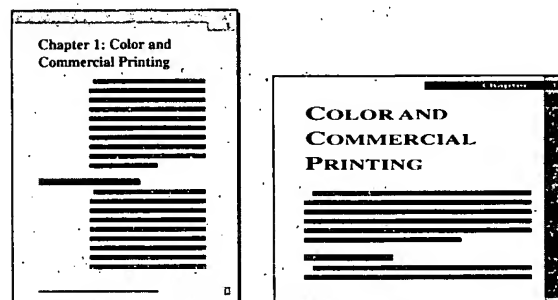
### Creating documents from blank paper

If no standard template or other existing document looks the way you want, you can use a blank paper document. A document created from blank paper includes a few basic formats. You can use these formats as is, change them, or create new ones.

You can customize the document FrameMaker uses to create portrait, landscape, and custom documents. For details, see “Changing templates for blank paper and text files” on page 316.

#### To create a document from blank paper:

- 1 Choose *File > New > Document*. On UNIX systems, you can also click *New* in the main FrameMaker window.
- 2 Do one of the following:
  - To create a standard one-column document, click *Portrait* or *Landscape*.



Examples of a portrait and a landscape document

- To create a document with exactly the page size, margins, and number of columns you want, click *Custom*.
- 3 If you clicked *Custom*, do the following and then click *Create*:
    - Choose a preset page size or enter the width and height for the pages.
    - Enter the number of columns and a gap. The gap is the space between columns.
    - Enter values for the margins, as measured from the edge of the page.

- Select a pagination option. If you select Double-Sided, choose Right 1st Page or Left 1st Page from the pop-up menu to determine the side on which the document starts.
- Choose the display units for the document. Display units are the units that FrameMaker uses when it measures distances in your document. These display units appear in dialog boxes and in the document window's status bar. For information, see "Changing the default units of measurement" on page 41.

## Opening documents

In addition to FrameMaker documents, you can open text files, files in MIF (Maker Interchange Format), and files in MML (Maker Markup Language). You can also open files created in other applications, such as Microsoft Word, if the required filter is installed. Much of the file's formatting is retained when you open the file. For information on filters, see the online manual *Using Filters*.

When you open a document, a document window appears.

### To open a file:

- 1 Choose File > Open. On UNIX systems, you can also click Open in the main FrameMaker window.
- 2 Locate the document you want to open and click Open. If FrameMaker displays an alert message or a dialog box before opening the document, see "Messages and dialog boxes that may appear" on page 33.

Opening a document usually updates graphics imported by reference, text insets, cross-references, and system variables (if there are any). For information on preventing this automatic updating, see "Opening documents without updating references" on page 36 and "Suppressing automatic updating of cross-references" on page 176.



*In Windows and on UNIX systems, you can limit the files listed in the Open dialog box by entering wildcards (regular expressions in UNIX) in the Open File Named text box. For example, if you enter \*.new, you see any folder or document that has the extension .new. If you enter Chapter?, you see any folder or document whose name consists of Chapter followed by a single character. To redisplay the entire contents of the folder, enter \* in the text box.*

## Opening recently opened documents

The bottom of the File menu lists the five documents you last opened or saved with the Save As command. You can open a listed document by choosing its filename.

## Messages and dialog boxes that may appear

If one of the following alert messages or dialog boxes appears, you must click OK or provide more information before continuing.

**Fonts or font metric information** If you click OK to continue, new fonts replace the missing ones. As a result, line breaks, page breaks, and the width of text lines may change.

If the Remember Missing Font Names option in the Preferences dialog box is selected, FrameMaker preserves the names of unavailable fonts. When missing font names are remembered, the original fonts will reappear—even if you save a document with substitute fonts—when you open the document on a computer that has the fonts installed.

**Missing imported graphics** Skip the missing graphic or specify a new location for it (see “Locating missing graphics” on page 409).

**Missing text insets** Click OK to continue opening the file. You can locate the insets later (see “Locating the source of unresolved text insets” on page 407).

**Unresolved cross-references** Click OK to continue opening the file. You can resolve the cross-references later (see “Resolving cross-references” on page 177).

**Unknown file type (Windows and UNIX)** Select a file type in the list and click Convert to continue opening the document.

## Opening text files

Text-only files do not contain graphics or formatting information. In Windows and on UNIX systems, when you open a text-only file, you may be asked to confirm that it is a text file.

### Open a text file:

1. Open the file (see “Opening documents” on page 33).

2. Do one of the following:

- To break the text into paragraphs only at blank lines, click Merge Lines into Paragraphs. Use this option for a paragraph-oriented text file such as a file containing document text.

- To break the text into paragraphs at the end of each line, click Treat Each Line As a Paragraph. Use this option for a line-oriented text file such as a file containing computer code.

3. If the file was saved on a system whose text encoding differs from yours, choose the appropriate encoding from the Text Encoding pop-up menu. If you choose an incorrect encoding, FrameMaker may replace some characters in the file.

4. Click Read. The text appears in a document that is created from a special template. You can customize the template so that documents created from text files are formatted differently (see “Changing templates for blank paper and text files” on page 316).

## Opening documents that are in use

FrameMaker helps you avoid making changes to documents that are already opened by others.

On the Macintosh, only one person at a time can use a file that’s stored on a Macintosh file system. If you try to open a file already in use, an alert message appears.

In all other cases, a file named *filename.lck* (where *filename* is the name of the open document) is created every time you open a document. This lock file is in the same folder as the original document and is removed when you close the document.

In Windows, you can turn off file locking. For details, see “Using files across platforms” on page 52.

If you try to open a document that’s already open and if you have write permission to the document, a dialog box appears, showing the name of the document, who opened it last and when, and the computer on which it is open. You might also see this dialog box after a system crash, when you open a document you were last using.

**To open a document that’s already in use:**

- 1 Open the file (see “Opening documents” on page 33).
- 2 Do one of the following:
  - If you want to look at the file but not change it, click Open for Viewing Only, and then click Continue. The document appears in View Only format.
  - If you want to edit a copy of the file, click Open Copy for Editing, and then click Continue.
  - If you want to edit the file and you know that no one else is using it, click Reset File Lock and Open, and then click Continue. Use this option after a system crash, to open a document that was open at the time of the crash.

## Opening view-only documents (Macintosh)

Double-clicking the Finder icon of a document saved in View Only format may open the document in a previous version of FrameViewer (if available), not in FrameMaker. To open a view-only document using FrameMaker, use File > Open.

## Opening MIF and MML files as text

MIF is an ASCII format that lets you exchange information between FrameMaker and other applications. MML is a markup language you can use to create simple FrameMaker documents with any text editor.

When you open a MIF file or an MML file, it is normally opened in Document or Book format. However, you can also open the file as text so that you can see and edit the MIF or MML commands.

**To open a MIF or MML file as text:**

- 1 Choose File > Open and select the file you want to open.
- 2 Do one of the following:
  - (Windows) Control-click Open.
  - (Macintosh) Option-click Open.
  - (UNIX) Shift-click Open.

## Opening documents in an earlier version of FrameMaker

You cannot open a FrameMaker 6.0 document in earlier versions of FrameMaker. If you need to open a document saved in FrameMaker 6.0 using an earlier version of FrameMaker, save the document in the MIF format, and then open the MIF file in the earlier version. Any feature or formatting in the document that is not available in the older version will be ignored. Each instance of an ignored feature will produce a message in your Console window (Windows and Macintosh) or in a UNIX window.

## Opening documents without updating references

A document can open slowly if it contains many cross-references to other files, large imported graphics, or many text insets. You can open a document faster by bypassing the update of imported graphics, cross-references, and text insets. However, if you use this method to open documents, keep in mind that FrameMaker will not warn you about missing items or unresolved cross-references. For this reason, you should occasionally open a document in the normal way.

## Open a document without updating references:

- 1 Choose File > Open and select the file you want to open.
- 2 Do one of the following:
  - (Windows) Control-click Open.
  - (Macintosh) Option-click Open.
  - (UNIX) Shift-click Open.

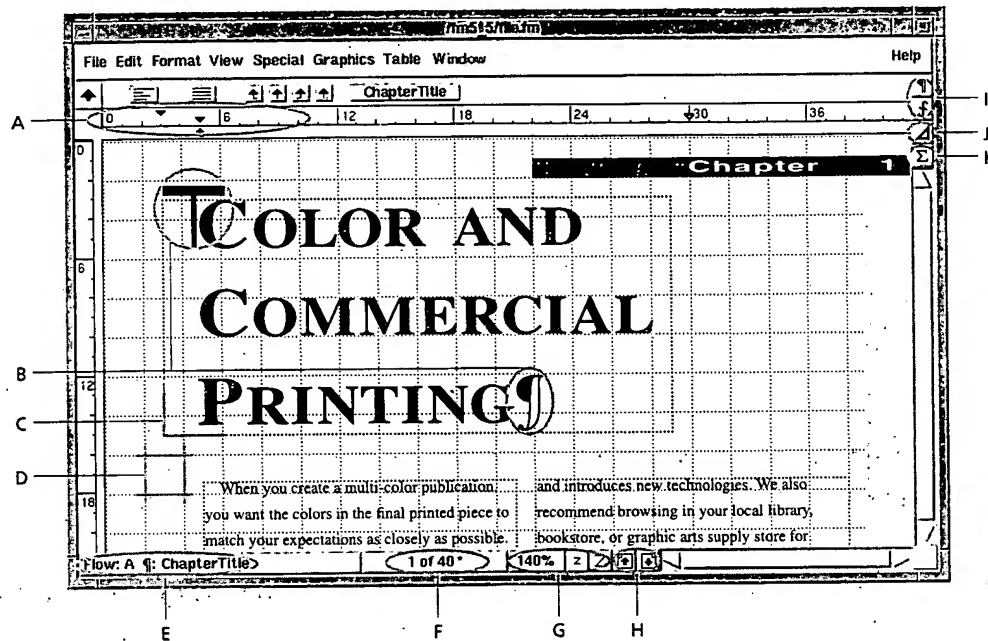
After the file is open, FrameMaker will import and display graphics as needed on a page-by-page basis. You can manually update cross-references and text insets by using Edit > Update References. If the page display is too slow, reopen the document in the usual way (see “To make pages display more quickly:” on page 44) for displaying pages faster.

## Opening files after a system crash

If your system crashes, an automatically saved file will contain recent changes to the file. A file is saved automatically in the following situations:

- If you selected Automatic Save in the Preferences dialog box, autosave files (whose filename contains *.auto*) are created at regular intervals.
- If your system becomes unstable, FrameMaker tries to create a recover file (whose filename contains *.recover*) with your most recent changes.

**DOCUMENT WINDOW** The document window contains guides and controls that help you work efficiently.



**A** The top *ruler* contains paragraph indent and tab stop symbols. When you draw, move, or resize an object, both the top and side rulers include guides that indicate the object's current position.

**B** *Text symbols* indicate where paragraphs and text flows end, and show the location of tabs, markers, and other items.

**C** *Borders* define the edges of text frames, graphic frames, table cells, and imported objects.

**D** The *visible grid* provides a visual cue for drawing and arranging objects.

**E** The *status bar* contains information about the document. The *Tag area* at the left side shows the current flow, paragraph, and character tags.

**F** The *Page Status* area shows the current page number and total page count.

**G** *Zoom controls* include buttons for zooming in and out and a pop-up menu for choosing a zoom setting.

**H** *Page buttons* display the next or previous page.

**I** The *Paragraph Catalog* and *Character Catalog* buttons display palettes of predefined text formats.

**J** The *Tools button* displays the Tools palette, which contains drawing tools and drawing properties.

**K** The *Equations button* displays the Equations palette, which contains commands for inserting, filling in, and manipulating equations.

### Reopen a file after a system crash:

- 1 Open the file you were working on last (see “Opening documents” on page 33).
- 2 Do one of the following:
  - If a recover file exists, open it when prompted and check whether your latest changes are there. If they are, save the recover file with the same name as the document you were originally working on and then delete the recover file.
  - If no recover file exists, open the autosave file when prompted and save it with the same name as the file you were originally working on. The autosave file contains all the changes you made up until the time of the last automatic save. The amount of work lost depends on the time interval you set between saves and when your system crashed.

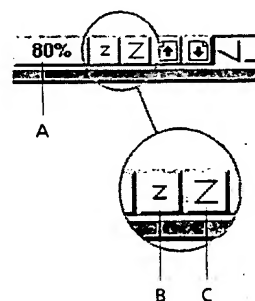
## Customizing the document display

You can change the way each document window looks in several ways:

- By zooming in and out.
- By displaying window guides: borders, text symbols, rulers, and grid lines.
- By changing the commands that appear on the menus.
- By changing the preset display units (for example, inches or points) that appear in dialog boxes.

## Zooming in and out

You can zoom in to focus on details or zoom out to see more. The Zoom pop-up menu shows the current zoom setting.



A. Zoom pop-up menu B. Zoom Out button  
C. Zoom In button

You can change the zoom setting of one or more documents in a book by selecting the documents in the book window and choosing a command from the View > Zoom menu. However, the Fit Page in Window, Fit Window to Page, and Fit Window to Text Frame will affect only selected documents that are open.

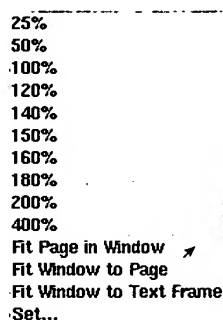
### To change the zoom setting:

Do one of the following:

- To magnify text and objects, click the Zoom In button. FrameMaker zooms in on the area of the page containing the insertion point or selection. If the document doesn't contain an insertion point or a selection, FrameMaker zooms in on the center of the page.
- To decrease the magnification, click the Zoom Out button.



- To display text and objects at a particular magnification, choose a percentage from the Zoom pop-up menu.
- To display the entire page in the current window, choose Fit Page in Window from the Zoom pop-up menu.



#### To resize the window to the size of the page:

Choose Fit Window to Page from the Zoom pop-up menu. If the view options are set to display facing pages, the window is resized to accommodate two pages side by side.

#### To resize the window to the size of the text frame:

Choose Fit Window to Text Frame from the Zoom pop-up menu.

#### To change the available zoom settings:

- 1 Choose Set from the Zoom pop-up menu.
- 2 Do one of the following:
  - To change the available zoom settings, select the percentage you want to change and enter the new percentage. Enter any percentage from 25% to 1600%. The values will be sorted from lowest to highest, so you can enter values in any text box.

- To return to the default percentages, click Get Defaults.

**Note:** In Windows and on UNIX systems, you can customize the default zoom settings. For information, see the online manual Customizing FrameMaker Products.

#### 3 Click Set.

#### To make 100% zoom match the page size in Windows:

- 1 Choose File > Preferences.
- 2 From the Monitor Size pop-up menu, choose the diagonal size of your computer monitor or enter a value, and then click OK.

If screen-to-paper fidelity is not critical, you may want to leave Monitor Size set to Default. This ensures cross-application compatibility, which is especially useful if you frequently edit embedded OLE objects within a document.

### Showing and hiding document window guides

You can show the following types of visual guides in the document window:

- Borders around text frames, graphic frames, and imported objects
- Markers, paragraph returns, and other symbols in running text
- Rulers along the top and left side of the window
- A grid of horizontal and vertical lines that provide a visual aid for drawing, placing, and resizing objects

The visible grid lines are independent of the snap grid, an invisible grid you use to align graphic objects and to position paragraph indents and tab stops precisely. For information on using the two grids together, see “Using grids” on page 206.

**To show or hide the document window guides:**

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Do the following:
  - To show or hide borders, choose View > Borders. (If the book window is active, choose View > Show Borders or View > Hide Borders.)
  - To show or hide text symbols, choose View > Text Symbols. The following symbols may appear in the document window.

Text symbol	Meaning
¶	End of paragraph
§	End of flow and end of table cell
.)	Tab
└	Anchored frame and table anchor
┐	Marker
{	Forced return
	Manual equation alignment point
␣	Nonbreaking space
—	Discretionary hyphen
—	Suppress hyphenation

- To show or hide rulers, choose View > Rulers.
- To show or hide grid lines, choose View > Grid Lines.

**To change the spacing of grid or ruler intervals:**

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose View > Options.
- 3 Choose a new setting from the Rulers pop-up menu or from the Grid pop-up menu, and click Set.

**Changing the menu display**

You can display a subset of the commands on the menus—quick menus. You can also customize the menus.

**To display quick menus:**

Choose View > Menus > Quick.

**To return to complete menus:**

Choose View > Menus > Complete.

**To customize menus:**

Add, move, or remove menus and commands as described in the online manual *Customizing FrameMaker Products*.

## Changing the default units of measurement

Some text boxes in dialog boxes require a unit of measurement (such as points or inches) for the value you enter. You can specify the default units for font size and line spacing (font size units) and for other measurements (display units). The default units of measurement appear after the values in the text boxes. If you enter a value without a unit of measurement, FrameMaker uses the default unit.

### To change the preset units:

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose View > Options.
- 3 Choose a unit from the Display Units and Font Size Units pop-up menus, and then click Set.

### To enter different units in a text box:

Enter one of the following abbreviations for the units along with the numeric value:

- **cm** to specify centimeters
- **mm** to specify millimeters
- **"** or **in** to specify inches
- **pc**, **pi**, or **pica** to specify picas
- **pt** or **point** to specify points

- **Q** to specify Q units (for font size and line spacing only)
- **dd** to specify didots
- **cc** or **cicero** to specify ciceros

FrameMaker converts the entry to the preset display units when you click a command button in the dialog box.

For example, if your document's display units are picas and if you want to set a paragraph indent of 1 inch, enter 1" in the First Indent text box. When you click Apply, the measurement changes to the number of picas that corresponds to 1 inch.

## Using command shortcuts

FrameMaker provides the following types of command shortcuts:

- Keyboard shortcuts for all commands (For a list of shortcuts, see the online Help.)
- The context (shortcut) menu, whose commands depend on the location of the pointer
- The QuickAccess bar, which contains commonly used text, graphics, and table editing commands
- The formatting bar, which contains pop-up menus and tab wells that you can use to set text alignment, spacing, and tab stops (see "Redefining (updating) formats" on page 121).


## Using the context menu

The context (shortcut) menu contains commonly used commands for the item under the pointer. You can display context menus for text, graphics, tables, the document as a whole (when the pointer is in the margin), or the selected documents in a book.

### To display a context menu:

Do one of the following:

- (Windows) Right-click or press Shift+F10.
- (UNIX) Right-click or press F4.
- (Macintosh) Hold down Control while pressing the mouse button.

 (Windows and UNIX) If you select text by right-dragging, the context menu appears when you release the right mouse button.

## Using the QuickAccess bar



You can keep the QuickAccess bar open in the work area and click commands as you need them.


### To display the QuickAccess bar:

With a document window active, choose View > QuickAccess Bar.

### To use the QuickAccess bar:

Do the following:

- To change the orientation of the QuickAccess bar, click (  ) or (  ) on the bar.

- To choose a command from the QuickAccess bar, click the command button.
- To display a different group of commands on the QuickAccess bar, click (  ) on the bar.

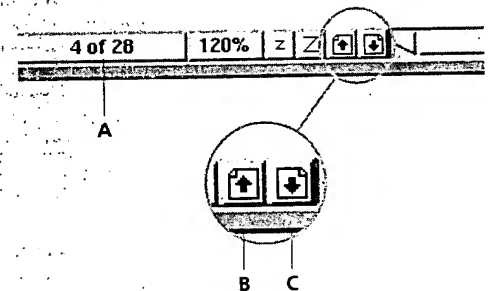
### To close the QuickAccess bar:

Do one of the following:

- (Windows) Choose View > QuickAccess Bar.
- (Macintosh) Click the close box on the bar.
- (UNIX) Put the pointer on the bar and press Control+c.

## Paging through documents

FrameMaker provides several controls in the status bar for displaying pages.



A. Page Status area B. Previous Page button  
C. Next Page button

You can control the direction in which FrameMaker scrolls pages—up and down or left and right. You can also display facing pages.

**QUICKACCESS BAR** The QuickAccess bar can be arranged horizontally or vertically. It always displays the common commands. In addition, it contains four pages of buttons for graphics, text editing, graphics editing, and table editing.



*The first 12 buttons of the Quick Access Bar are used for the common commands. By clicking the Next and Previous buttons, you can cycle through additional options.*

#### COMMON

Help		Flip QuickAccess bar
New		Open
Save		Print
Cut		Copy
Paste		Undo
Previous QuickAccess bar		Next QuickAccess bar

#### GRAPHICS

Group		Ungroup
Bring to Front		Send to Back
Distribute		Reshape
Smooth		Unsmooth
Flip Up/Down		Flip Left/Right
Scale		Object Properties
Snap		Gravity

#### GRAPHICS EDITING

Move up 1pt		Move down 1pt
Move left 1pt		Move right 1pt
Top align		Left align
Top/bottom center align		Left/right center align
Bottom align		Right align
Rotate clockwise		Rotate counter-clockwise
Solid line		Dashed line

#### TEXT EDITING

Plain		Bold
Italic		Underline
Increase size 1 pt		Decrease size 1 pt
Lowercase		Anchored Frame
Initial Caps		Insert Footnote
Uppercase		Insert Table
Find/Change		Spelling Checker

#### TABLE EDITING

Select row		Select column
Select table		Select body cells in column
Move insertion point to top left cell		Cut row/column
Add row below		Add column right
Top-align in cell		Straddle/Unstraddle
Middle-align in cell		Shrinkwrap cells
Bottom-align in cell		Custom Ruling & Shading

If the document you are paging through is part of an open book, FrameMaker may display an alert message asking if you want to open the next or previous document in the book. For example, if you click the Previous Page button on the first page of a document, clicking Yes in the alert message box will open the previous document in the book. The last page of that document will appear.

#### **To display a specific page:**

Do one of the following:

- To display the next page, click the Next Page button.
- To display the previous page, click the Previous Page button.
- To display the first page, Shift-click the Previous Page button.
- To display the last page, Shift-click the Next Page button.
- To display a specific page or the page containing a specific line number, click in the Page Status area, specify the page or line number you want to display, and then click Go.
- To display the page containing the insertion point, click in the Page Status area, click Page Containing the Insertion Point, and click Go.

#### **To set how pages scroll:**

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose View > Options.

3 Choose one of the following options from the Page Scrolling pop-up menu:

- To display pages from top to bottom (for example, page 2 below page 1), choose Vertical.
- To display pages from left to right (for example, page 2 to the right of page 1), choose Horizontal.
- To display pages two at a time, side by side, choose Facing Pages.
- To display as many pages as will fit in the window from left to right, choose Variable.

4 Click Set.

#### **To make pages display more quickly:**

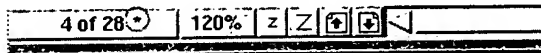
Do the following:

- Open the document without bypassing the update of imported graphics, cross-references, and text insets. (The technique described in “Opening documents without updating references” on page 36 makes a document open faster, but may slow down the display of pages.)
- Turn off the display of graphics by choosing View > Options, turning off the Graphics option, and clicking Set. This hides all imported graphics and all graphics that have been created with FrameMaker drawing tools. The graphics also do not appear in print.
- Display small text as gray bars by choosing File > Preferences, entering a point size in the Greek Screen Text Smaller Than text box, and clicking Set. Whenever text in your document is displayed in a point size smaller than the size you specified, it appears on-screen as a gray bar.


## Saving documents

You can save a document using its current name and location, or save a copy of the document using a different name or location. You can save a document in several formats, including HTML, XML, and PDF.

When a document or a book needs to be saved, an asterisk (\*) appears in the Page Status area of the status bar.



An asterisk indicates unsaved changes.

 *It's a good idea to avoid using accented characters, symbols, and other special characters in your filenames. You may encounter problems if you try to open the file in another operating system.*

### To save a document:

- 1 Do one of the following:
  - To overwrite the current version on the disk, choose File > Save.
  - To save the file in a different folder or using a different name, choose File > Save As.
- 2 If you choose the Save As command, or if the file has never been saved, specify the new filename and location. If you want to save the file in a different format, choose the format from the pop-up menu (see "File formats you can save in" on page 45).
- 3 Click Save. If you choose Text Only format, you must specify how to treat the text and tables in the document (see "Saving documents in Text Only format" on page 47).

### To save a book:

- 1 Do one of the following:
  - To overwrite the current version on the disk, choose File > Save Book.
  - To save the file in a different folder or using a different name, choose File > Save Book As.
- 2 If you choose the Save Book As command, or if the file has never been saved, specify the new filename and location.

### To save all open documents:

Hold down Shift and choose File > Save All Open Files.

### To return to the saved version of your document:

Choose File > Revert to Saved and click OK.

## File formats you can save in

You can use the Save As command to save a file in the following formats.

**Document or Book** Produces a normal FrameMaker document or book with the smallest file size possible.

**MIF** Creates a text file containing FrameMaker statements that describe all text and graphics. To avoid overwriting your original document, save the MIF file under a different name. (For example, add a .mif extension to the name.) For information on MIF, see the online manual *MIF Reference*.

**View Only** Produces a book or document that users can open but can't edit. If you accidentally save a file in View Only format, you can make it editable by pressing Esc Shift+f l (lowercase L) k. Then you can save the document or book in Document or Book format.

**HTML** Creates a Hypertext Markup Language (HTML) document that can be viewed on the World Wide Web. For information on adjusting the mapping of paragraph and character tags to predefined HTML elements, see "Adjusting HTML mappings" on page 462.

**XML** Creates an Extensible Markup Language (XML) document that can be used for data exchange and viewed on the World Wide Web. For information on working with XML documents, see "About XML" on page 478.

**PDF (Portable Document Format)** Creates documents that can be viewed with Adobe Acrobat Reader or Adobe Acrobat Exchange. For information, see "Saving documents and books as PDF" on page 479.

**Text Only** Creates a text file without graphics or formatting information. To avoid overwriting your original document, save the text file under a different name. (For example, add a *.text* extension to the name.) For information, see "Saving documents in Text Only format" on page 47.

**Stationery (Macintosh)** Creates a reusable template document. Stationery always opens as an untitled copy of the document, preserving the original so it can be used again.

**Other file formats** Create files that can be read by other applications. For example, you can save in Rich Text Format (RTF), which is supported by many word processors, or in any other format for which an export filter is installed. Most formatting is preserved, and formats are usually converted to word-processing styles. For details, see the online manual *Using Filters* and "Using Save As to export to other formats" on page 416.

### Filename extensions for saved files (Windows)

When you save a file for the first time in Windows, FrameMaker automatically adds these extensions: *.fm* for documents, *.book* for book files, and *.mif* for MIF files. With these extensions, the files will continue to be recognized as FrameMaker files by the Windows operating system.

If you don't want these special extensions to be added to the filenames you assign, enclose the filenames in double quotation marks. Windows won't recognize a file without one of these extensions as a FrameMaker file, but you'll still be able to open the file in FrameMaker.

If you assign an extension that's registered by another application (for example, *.doc*), your extension won't be replaced by the FrameMaker extension.



## **Saving documents in Text Only format**

Saving a document in Text Only format creates a text file with the text encoding of your choice: ANSI (Windows), Macintosh, ISO Latin-1 (UNIX), or ASCII. (On Japanese-language systems, you can also use JIS, Shift-JIS, or EUC. On other Asian-language systems, you can use encodings for the supported languages.) Only ordinary text—text in text frames and tables—is saved; graphics, text in graphic callouts, footnotes, and formatting information are not saved. Reformat line lengths and hyphenation as needed before saving the file (see “Changing indents and alignment” on page 98 and “Changing hyphenation and line breaks” on page 105).

If some characters are not available in the text encoding that you choose, those characters will be replaced in the text file. For example, when you save a document in Text Only format using ANSI (Windows), ISO Latin-1 (UNIX), or ASCII encoding, spaces (including thin, en, em, and numeric spaces) are converted to regular spaces. If you use Macintosh encoding, thin, en, and em spaces are converted to regular spaces, but numeric spaces are converted to nonbreaking spaces.

### **To save a document as text only:**

- 1 Choose File > Save As.
- 2 Specify the filename and location, and choose Text Only format.
- 3 Click Save.

4 Do one of the following:

- To break each line into a separate paragraph, click At the End of Each Line. This option maintains a file's original line breaks and blank lines. Use this option for a line-oriented file such as computer code.
- To merge adjacent lines into paragraphs and insert a carriage return only at blank lines, click Only between Paragraphs. Use this option for paragraph-oriented files such as files containing document text.

5 If you want to save table text, select Include Text from Table Cells. Then do the following:

- Specify the order in which you want the table cells saved (row by row or column by column).
- Choose whether to separate cells with tabs or with carriage returns by choosing items from the pop-up menus.

6 If the text file will be used on a platform that uses a different text encoding, choose an appropriate encoding from the Text Encoding pop-up menu.

7 Click Save.

## **Backing up and saving automatically**

FrameMaker can back up and save your work automatically.

### **To specify an automatic save option:**

- 1 Choose File > Preferences.
- 2 Do the following:

- To create a backup file every time you save, select Automatic Backup on Save. This creates a copy of the file before your latest changes are saved. If a backup file already exists, the new backup file overwrites it. (The filenames of backup files contain *.backup*.)
- To create an autosave file at regular intervals, select Automatic Save and enter an interval (in minutes) in the text box. This causes a copy of the file to be saved periodically without your having to choose File > Save. (The filenames of autosave files contain *.auto*.) When you save manually or revert to the last-saved version with the Revert to Saved command, the autosave file is deleted.

3 Click Set.

## Printing documents

When you print a document, you can specify options such as how many copies to print and whether to print crop marks and registration marks. The available options vary slightly with the platform and the printer you are using.

For information on printing a book made up of several documents, see “Printing from a book window” on page 367.

**Important:** If you have turned off graphics in the View Options dialog box, graphics will not appear in the printed document.

### To print a document:

- 1 Choose File > Print.

- 2 Specify the page range you want to print. On the Macintosh, you can enter just the starting page number when you want to print from that page to the end of the document, or just the ending number when you want to print from the beginning of the document to that page.

- 3 Select other print options as described in the next section, and then click Print.



*On UNIX systems, if you want to change the print settings for a document but don't want to print it yet, change the settings in the Print dialog box and click Save Settings Only.*

## Print options

The following print options are available for all printers. Unless stated otherwise, all options described in this section are in the Print dialog box. For information on additional options available for your printer, see your printer documentation.

**Note:** (Windows) FrameMaker products for Windows have no control over the abilities or limitations of any printer driver. FrameMaker products can support only printer drivers that have been approved for use in Windows NT or Windows 95 or later. If you are using an outdated printer driver, you may experience problems such as lost graphics and characters and inability to open documents. See the Adobe Web page for information on installing the latest postscript drivers.

**Collating** To print one complete copy before printing the next copy, select Collate when you're printing multiple copies. Printing might be slower when Collate is selected.

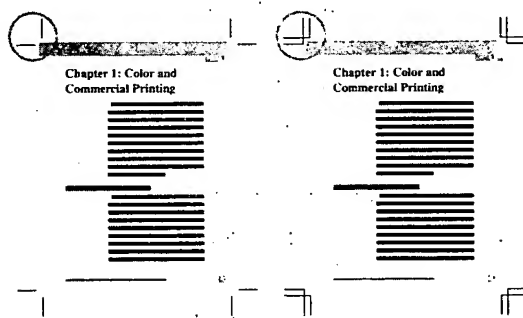
**Printing double-sided** To print a double-sided document when you're not using a duplex printer, print the odd-numbered pages, turn the paper over in the printer, and print the even-numbered pages. Depending on how your printer produces pages, you may need to select Last Sheet First before you click Print, because turning the paper over in the printer may reverse the page order.

**Changing page order** To print a document starting with the last page, select Last Sheet First.

**Printing more quickly (Windows and UNIX)** To print a document more quickly, select Low-Resolution Images. In Windows, imported images are printed as gray boxes. On UNIX systems, they are printed with lower resolution.

**Printing crop marks and registration marks** To print a document with crop marks and registration marks, select Registration Marks.

You can choose between Western and Tombo (Japanese) crop marks.

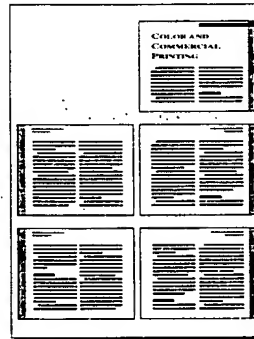


Western and Tombo crop marks

**Reducing or enlarging the page image** To print a reduced or enlarged page image centered on the page, do one of the following:

- (Windows and UNIX) Enter a percentage in the Scale text box.
- (Macintosh) Choose File > Page Setup and enter a percentage in the Reduce or Enlarge text box.

**Printing thumbnails** To print thumbnails (small images of several pages on one page), enter values in the Thumbnails text boxes. In the Rows text box, enter the number of thumbnails you want to print down the page. In the Cols text box, enter the number of thumbnails you want to print across the page.



Thumbnails

**Skipping blank pages (Windows and Macintosh)** To prevent printing blank pages, select Skip Blank Pages.

**Printing colors in black and white** To ensure that colored items are printed in black and white rather than in shades of gray, do one of the following:

- (Windows) Select Spot Color As Black/White.

- (Macintosh) With the Apple LaserWriter 8 printer driver or the Adobe PS Printer driver 8, click Options, choose Black and White from the Print pop-up menu, and then click OK. In version 7 of the LaserWriter printer driver, select Black and White in the Print dialog box.
- (UNIX) Edit the beginning of the `ps_prolog` file in `$FMHOME/fmunit`. The `ps_prolog` file contains instructions for changing print settings. Changes to the file take effect immediately. To make changes without affecting other users, save a copy of the file with the changes to your personal `fmunit` folder (`~/fmunit/ps_prolog`).

**Feeding paper manually** To print the document on paper that is not in your printer's paper cassette, do one of the following:

- (Windows) Choose File > Print Setup. Choose Manual Feed from the Source pop-up menu and click OK.
- (Macintosh) Choose Manual Feed from the pop-up menu in the Paper Source area.
- (UNIX) Select Manual Feed.

**Note:** (Windows) The Print Document dialog box in FrameMaker contains some options that may also appear in the Windows printer Properties dialog box, such as the number of copies. When you print a document, FrameMaker printer settings override Windows printer settings.

**Changing paper size (UNIX)** To print the document on a different paper size, choose a paper size from the Paper Size pop-up menu, or type the dimensions in the Width and Height text boxes. Because these dimensions describe the physical size of the paper in the printer's paper cassette (not the orientation of the document), the Width setting should always match the width of the edge of the paper that feeds into the printer.

If your document's pages are larger than the size of the paper, you'll see an alert message. If you decide to print the document, the printer crops the document.

**Downloading fonts (UNIX)** To choose the fonts to download to the printer, choose from the Download Fonts pop-up menu. You don't need to download fonts that are already in the printer's memory or on a hard disk attached to the printer. For example, if your printer contains the Standard 35 fonts, choose All but Standard 35. You cannot use this option to download Japanese fonts.

The Standard 35 fonts (Avant Garde, Bookman, Courier, Helvetica, Helvetica Narrow, New Century Schoolbook, Palatino, Symbol, Times, Zapf Chancery, and Zapf Dingbats font families) are usually included with PostScript printers.

**Using a different printer (UNIX)** To use a different printer, choose the printer name from the Destination pop-up menu. All printers configured for your computer should appear in the pop-up menu. If a printer doesn't appear, or if you're using a special printing script (for example, to send a fax), choose Other Printer from the pop-up menu and type the appropriate parameters into the text box that appears.

## Printing to a file

You can create a print file rather than print the document. For example, you may want to edit the file (by using an application that performs postprocessing), send it to a service bureau for typesetting, or download it later to a PostScript printer.

You can also create a Portable Document Format (PDF) file, which can be viewed with Adobe Acrobat, by using the Save As command. For information, see "About saving as PDF" on page 479.

### To create a single print file:

1 Choose File > Print if you are printing a single document, or choose File > Print Book or File > Print Selected Files if you are printing a book.

2 Do one of the following:

- (Windows) Select Print Only to File and enter the path and filename in the text box.
- (Macintosh) Click File in the Destination area of the Print dialog box.
- (UNIX) Choose Single PostScript File from the Print Destination pop-up menu.

If you're using a PostScript printer driver, the print file consists of PostScript code. You might want to enter an extension for your file that describes the file, such as .ps.

### To create a series of separate print files for a book:

1 In the book window, choose File > Print Book, or select the documents you want to print and choose File > Print Selected Files.

2 Do one of the following:

- (Windows) Select Print Only to File, and then enter the path and type an asterisk (\*) instead of a filename (such as c:\mydocs\\*). Choose Print.
- (Macintosh) Choose File from the Destination pop-up list and choose Save. Type an asterisk (\*) in the name text box and choose Save.
- (UNIX) Choose PostScript File for Each Document from the Print Destination pop-up menu, and then choose Print.

FrameMaker will print the files with .ps extensions in the specified location.

## Using files across platforms

You help keep FrameMaker files fully compatible across platforms with compatibility preferences. For more information on cross-platform and network compatibility, see "Opening documents that are in use" on page 34 and the online manual *Working on Multiple Platforms*.

### To change compatibility preferences:

- 1 Choose File > Preferences.
- 2 Do the following:
  - To preserve the names of unavailable fonts when FrameMaker substitutes existing fonts, select Remember Missing Font Names. The original fonts will reappear when you open the document on a system that has the missing fonts installed.
  - (Windows and Macintosh) To display errors that FrameMaker finds as it opens files, select Show File Translation Errors.
  - (Windows and Macintosh) To specify another platform with which to maintain filename compatibility, choose a setting from the Cross-Platform pop-up menu.
  - (Windows) To warn a user on a network before opening and modifying the document if it is already open for another user, select Network File Locking.

- (Windows and Macintosh) To add a FrameImage facet to bitmap graphics imported by copying, select Save FrameImage with Imported Graphics. Each graphic will be saved in its native format and in FrameImage format (a format that is supported on all platforms). When you open the document on another computer or on a platform that doesn't support the native format, the FrameImage copy will be used.

- 3 Click Set. The settings take effect immediately.

## Closing documents

You can close a document at any time. If you have unsaved changes, you'll be asked whether you want to save the changes. (A document with unsaved changes contains an asterisk in the Page Status area of its status bar.)

If imported graphics, text insets, cross-references, or system variables were updated when you opened your document, the document is marked as changed (with an asterisk in the status bar) when it opens. Similarly, because printing a document causes cross-references (if there are any) to be updated, printing a file may also cause a document to be marked as changed.

### To close a document:

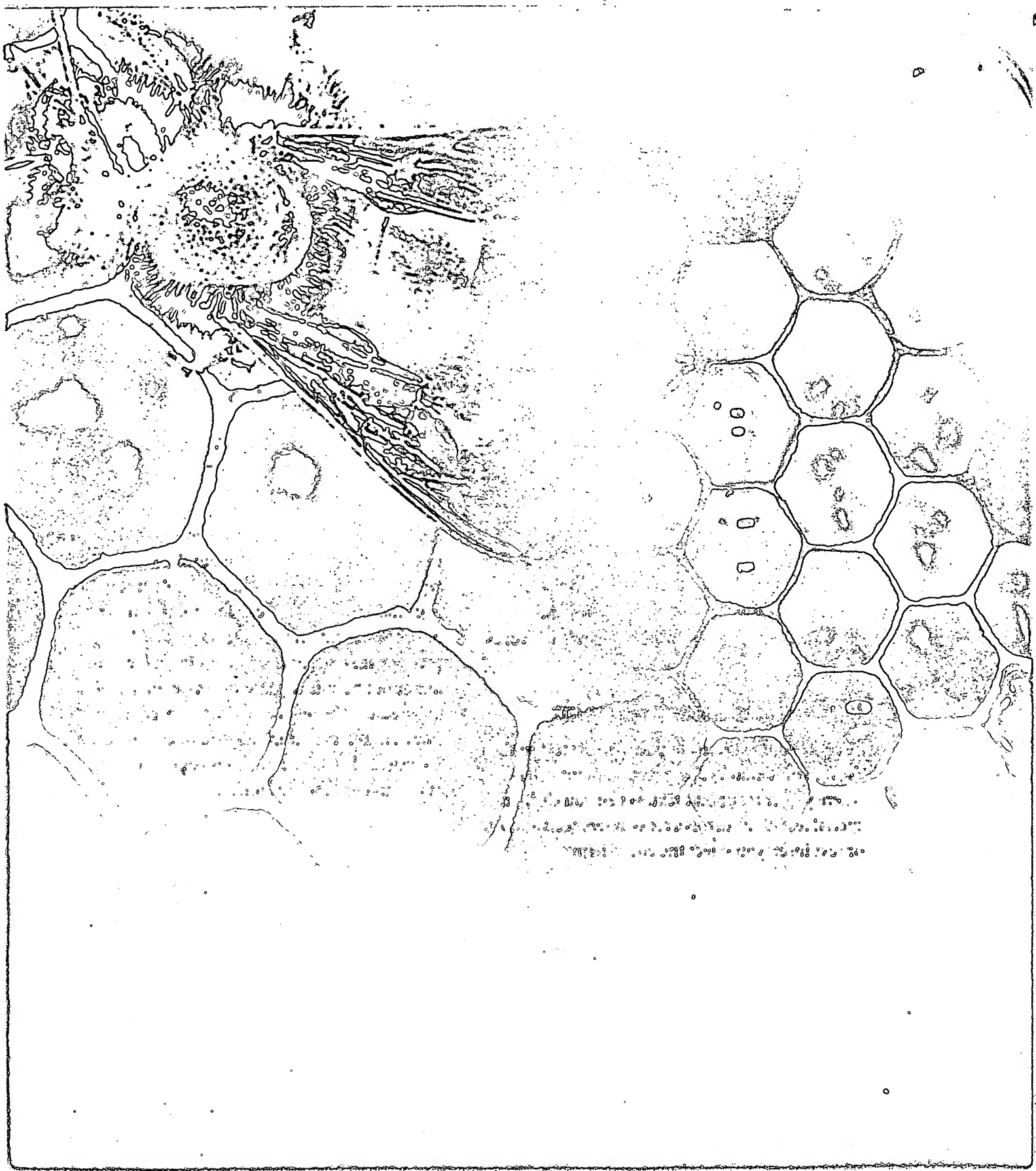
Choose File > Close.

### To close all open documents:

Hold down Shift and choose File > Close All Open Files.



3





# Chapter 3: Word Processing

**F**or editing text, FrameMaker is flexible and straightforward. You can add or delete text, and you can copy or move it to another location.

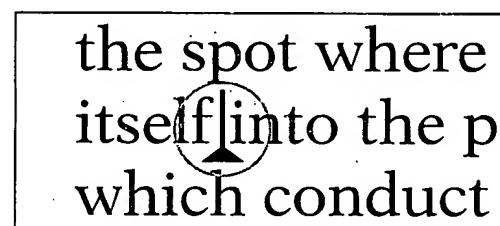
FrameMaker includes the following powerful editing tools:

- The Find/Change command, which can find not only text but also items such as character formats, paragraph tags, anchored frames, and the contents of the Clipboard
- The Spelling Checker, which can find and correct misspellings and common typing errors such as extra spaces and repeated words
- The Thesaurus, which defines words and provides synonyms, antonyms, and related words

## Placing the insertion point

Click to put the insertion point in any text in the document window. The insertion point marks where you enter or edit text. When you click on a special text item such as a cross-reference, variable, or text inset, you select the entire item.

The location of the insertion point determines the current paragraph—the paragraph to which paragraph formatting commands are applied.




*Insertion point in text*

If you can't place the insertion point in or next to text, the text might be background text that was typed on a master page. You can display the master page that contains the text and put the insertion point in the text on that page (see "Displaying master pages" on page 282). In other cases, you might not be able to place the insertion point in text because the text is automatically generated (for example, paragraph autonumbers) or because it's repeated from the previous page (for example, table titles or table headings).

## Entering and editing text

You enter text by typing in the document window. As you type, the text flows to another line or column. Press Return only when you want to begin a new paragraph. When you reach the end of a page, FrameMaker automatically creates a new page. If you want to force a line or page break at a specific location, use the information in “Changing hyphenation and line breaks” on page 105 or “Changing page and column breaks” on page 107.

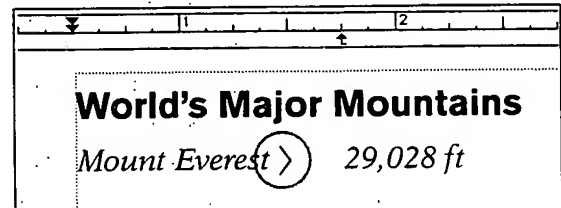
 To adjust the space between paragraphs, change the spacing properties in the paragraph format rather than press Return repeatedly. For details, see “Changing spacing” on page 101.

Along with the standard characters on your keyboard, you can type bullets, mathematical symbols, spaces of various widths, international characters, and other special characters.

Many features make typing easier. For example, Smart Quotes inserts the appropriate left or right quotation mark when you type a straight quotation mark. Smart Spaces prevents you from typing more than one space in a row.

## Using tabs

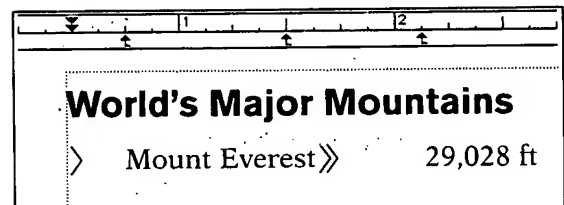
Each time you press Tab, a tab symbol ( ) is embedded in the text. The symbol does not appear in the printed document, but it is visible on-screen when text symbols are visible.



Tab symbol

If the current paragraph has tab stops set, FrameMaker moves the insertion point and text one tab stop each time you press Tab. If tab stops are not set, pressing Tab doesn't move the insertion point and text. If you press Tab more times than you have tab stops, the Tab symbols overlap. If you later add tab stops to the paragraph, FrameMaker positions the text correctly at the tab stops.

FrameMaker uses tab stops that are absolute rather than relative. With relative tab stops, each time you press Tab, the insertion point moves to the next available tab stop. With absolute tab stops, the *n*th tab on a line moves the insertion point to the *n*th stop. If that tab stop is to the left of the insertion point, the insertion point does not move.



Press Tab three times to move to the third tab stop.

For information on the types of tab stops you can add to a paragraph, see “Changing tab stops” on page 99.

## Typing special characters

You use combinations of keys to type bullets, dashes, fixed-width spaces, and accented characters such as ç, ñ, and ö. If the Symbol font is installed on your system, you can type any of the symbols in that font—for example, ©, ∴, and ∞. If the Zapf Dingbats font (or any other “picture” font) is installed on your system, you can type any of the special symbols in that font—for example, □, ▲, and ✓.

This section describes how to type bullets and dashes. The next section describes how to type fixed-width spaces. For a list of characters in the Symbol and Zapf Dingbats fonts, a list of accented characters in the standard character set, and information on inserting the Euro currency symbol, see the online manual *FrameMaker Character Sets*.

**Note:** In Windows and on UNIX systems, some special characters are entered or displayed differently in dialog boxes. In Windows, you enter a sequence of characters beginning with a backslash (\); these sequences are listed in Appendix A, “Typing in Dialog Boxes.” On UNIX systems, the backslash sequences may appear in text boxes, even though you don’t have to type the sequences to enter the characters.

### To type a bullet (•):

Press Control+q %. You can also press Option+8 (Macintosh) or Meta+period (UNIX).

### To type an em dash (—):

Press Control+q Shift+q. You can also press Shift+Option+hyphen (Macintosh).

### To type an en dash (–):

Press Control+q Shift+p. You can also press Option+hyphen (Macintosh).

## Typing special spaces

When you press the spacebar, you insert a proportional space (whose width depends on the characters on either side of it). You can also insert special fixed-width spaces—for example, to increase the space between two words. When you type a special space between two words, the words always remain together on one line.

You can use the following types of special spaces:

- An em space is the same width as the point size of the font you use. For example, if you use a 10-point font, an em space is 10 points wide.
- An en space is half the width of an em space.
- A numeric space is the same width as the font’s zero (0) character. All digits are typically the same width. This space is useful for aligning numbers in a column without using tabs.
- A thin space is one-twelfth the width of an em space. A thin space is often used when a very small space is needed to separate two characters—for example, between a number and the unit of measure that follows it, or between characters that appear too close together—for example, /).
- A nonbreaking space is the same width as the default space width for the font.

**To type an em space:**

Do one of the following:

- (Windows) Press Esc space m or Control+Shift+space.
- (Macintosh) Press Esc space m or Command+Option+9.
- (UNIX) Press Esc space m.

**To type an en space:**

Do one of the following:

- (Windows) Press Esc space n or Alt+Control+space.
- (Macintosh) Press Esc space n or Command+Option+8.
- (UNIX) Press Esc space n.

**To type a numeric space:**

Do one of the following:

- (Windows and UNIX) Press Esc space 1 (one).
- (Macintosh) Press Esc space 1 (one) or Command+Option+0 (zero).

**To type a thin space:**

Do one of the following:

- (Windows and UNIX) Press Esc space t.
- (Macintosh) Press Esc space t or Command+Option+7.

**To type a nonbreaking space:**

Do one of the following:

- (Windows and UNIX) Press Control+space.
- (Macintosh) Press Option+space.

A nonbreaking space symbol ( **␣** ) appears when text symbols are visible.

**Using Smart Spaces or Smart Quotes**

When Smart Spaces is on, you can't type more than one proportional space in a row. However, you can type multiple fixed-width spaces (see "Typing special spaces" on page 57).

When Smart Quotes is on, FrameMaker uses a curved left or right quotation mark whenever you press the ', ` , or " key. If you prefer to use straight quotation marks, turn off Smart Quotes. You can use combinations of keys to type curved quotation marks when Smart Quotes is off, or to type straight quotation marks when Smart Quotes is on.

Smart Quotes doesn't apply to text in dialog boxes. For information on typing quotation marks and apostrophes in dialog boxes, see the online manual *FrameMaker Character Sets* and Appendix A, "Typing in Dialog Boxes."

**Note:** For information on customizing quotation marks for languages other than US English in Windows or on UNIX systems, see the online manual *Customizing FrameMaker Products*.

### To turn Smart Spaces or Smart Quotes on or off:

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose Format > Document > Text Options.
- 3 Change the Smart Spaces or Smart Quotes option and click Apply. When you select Smart Quotes, FrameMaker doesn't change any quotation marks that are already in the document. To find straight quotation marks and apostrophes, and change them to curved quotation marks and apostrophes, use the Spelling Checker (see "Checking spelling" on page 71) or the Find/Change command (see "Searching for any item" on page 63).

### To enter straight and curved quotation marks in Windows:

Do one of the following.

To type	With Smart Quotes on, press	With Smart Quotes off, press
'	Control+'	Control+'
"	Esc "	"
`	Control+`	Control+`
´	Control+q plus (+)	Control+q plus (+)
‘ and ’	' and '	` and ´
“ and ”	" and "	Alt+Control+` and Alt+Control+'

### To enter straight and curved quotation marks on the Macintosh:

Do one of the following.

To type	With Smart Quotes on, press	With Smart Quotes off, press
'	Control+'	Control+'
"	Control+''	"
`	Control+`	Control+`
´	Shift+Option+e	Shift+Option+e
‘ and ’	' and '	Option+] and Option+{
“ and ”	" and "	Option+[ and Option+{

### To enter straight and curved quotation marks on UNIX systems:

Do one of the following.

To type	With Smart Quotes on, press	With Smart Quotes off, press
'	Control+'	Control+'
"	Control+''	"
`	Control+`	Control+`
´	Control+q plus (+)	Control+q plus (+)
‘ and ’	' and '	` and ´
“ and ”	" and "	Meta+` and Meta+'

## Typing special text items

In addition to text, you can insert special text items such as cross-references, footnotes, variables, and markers. Inserting a variable automatically places the date, time, page count, filename, or text that you define into a document. FrameMaker updates variables when they change. Markers can be used to generate lists and indexes and to insert hypertext commands.

### To insert a special text item:

Choose the appropriate command from the Special menu. For information, see the following:

- On cross-references, see Chapter 6, “Cross-References and Footnotes.”
- On footnotes, see “Working with footnotes” on page 178.
- On variables, see Chapter 7, “Variables.”
- On markers for generated lists and indexes, see “Preparing documents for a list of markers” on page 325 and “About indexes” on page 331.
- On markers for hypertext commands, see “Inserting hypertext commands” on page 425.

## Selecting text

You usually select text before you edit it. You also select text before you change its format, such as its font size or style. Selected text is highlighted.

For information on selecting text in tables, see “Typing and selecting text in tables” on page 131.

### To select text:

Do one of the following:

- To select a range of text, drag through the text (or click one end of the text and Shift-click the other).
- To select a word, double-click it.
- To select a paragraph, triple-click it.
- To select all the text in a flow, click in the flow and choose Edit > Select All in Flow.
- To shorten or extend an existing selection, Shift-click at the new beginning or end of the selection.

## Copying, moving, and deleting text

You use the Edit menu commands to cut, copy, and paste text to and from the Clipboard. When you use Edit > Cut or Edit > Copy, the cut or copied text remains on the Clipboard until you choose Cut or Copy again.

Pasted text always retains its character format properties. If the pasted text contains paragraph symbols (¶), the paragraph format associated with each paragraph is also pasted. Otherwise, the pasted text takes the paragraph format of the paragraph in which it's pasted.

You copy text more quickly if you bypass the Clipboard. You can do this, however, only if the original text and the new location are visible. The new location can be in a different document.

**To copy text quickly without using the Clipboard:**

Put the insertion point where you want to insert the copied text, and then do one of the following:

- (Windows) Hold down Alt and select the text you want to copy.
- (Macintosh) Hold down Command and Control and select the text you want to copy.
- (UNIX) Hold down Control and use the middle mouse button to select the text you want to copy.

**To delete or replace text:**

Select the text and do one of the following:

- To delete the text, press Delete. You can also choose Edit > Clear.
- To replace the text, type the new text.

If the text you delete or replace contains the end of a paragraph and the paragraph symbol, the beginning of the paragraph is merged with the next paragraph. If you didn't intend to combine the two paragraphs, immediately choose Edit > Undo. Then select the text you want to delete or replace (but not the paragraph symbol), and try again.

**To delete a page of text:**

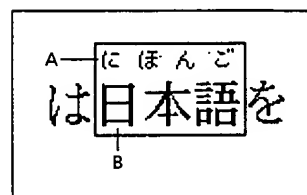
Do one of the following:

- To delete both the page and its text, choose Special > Delete Pages. If the page contains the beginning of a table that continues on another page, the entire table is deleted.
- To delete just the text on a page, select the text and press Delete.

For information on deleting empty pages at the end of a document, see "Adding and deleting empty pages" on page 279.

**Entering rubi text for Japanese**

Rubi text—small characters that appear above other characters—is used in Japanese-language documents to indicate pronunciation.



A. Rubi text B. Oyamoji text

If Japanese fonts are installed on your system, FrameMaker provides commands for entering rubi and for specifying how you want the rubi to appear. For information on adjusting the size, location, and spacing of rubi text, see "Adjusting spacing in Japanese documents" on page 103.

**To type rubi:**

- 1 Select the characters above which you want to type rubi. The selected text cannot contain a paragraph symbol (¶) or a forced return symbol (↵).

2 Choose Special > Rubi and type the text. (If the Rubi command doesn't appear on the Special menu, press Esc s r instead of choosing Special > Rubi.) The rubi appears above the selected characters. If the selected characters span two lines, the characters will all appear on the same line.

*Note: If the rubi collides with the preceding line of text, either set the line spacing large enough to accommodate the rubi (at least 150% of the font size) or turn off fixed line spacing (see "Changing spacing" on page 101).*

3 To return to the regular text when you finish typing the rubi, click in it or choose Special > Rubi again.

## About searching

In addition to text, you can search for any of the following items.

**Text formats and tags** Character format properties, or specific paragraph or character tags.

**Markers** Any markers regardless of their marker types, markers of a specific type, or markers that contain specified text.

**Cross-references** Any cross-references regardless of their formats, cross-references that use a specific format, or unresolved cross-references—cross-references that FrameMaker is unable to update. When an unresolved cross-reference is found, the marker text of the cross-reference appears in the Find text box.

**Text insets** Any text imported by reference, including Macintosh text subscribers. You can also search for unresolved text insets—insets that cannot be updated from their sources. However, you can't search for graphics subscribers or OLE linked objects. (To list OLE links in Windows, choose Edit > Links.)

**Publishers** Macintosh text publishers.

**Variables** Any variables regardless of their variable names, or specific variables.

**Rubi** Any rubi text, when Japanese fonts are installed on your system.

**Anchored frames** You can find graphics by searching for the anchored frames that contain them. Graphics placed in non-anchored frames will not be found.

**Footnotes** Any text or table footnotes.

**Tables** Any tables regardless of their table format tags, or tables with a specific tag.

**Conditional text** Any conditional text regardless of its condition tags, text with specific condition tags, or unconditional text. FrameMaker cannot find conditional table rows or hidden conditional text.

**Automatic hyphen** Words that are hyphenated automatically.

**Text and character format on the Clipboard** Text that matches the Clipboard's text, capitalization, and character formatting.



## Searching through a document

If you are searching in a document, FrameMaker begins searching at the insertion point and continues through the document. It searches only pages of the type the insertion point is on—for example, only body pages or only master pages. When FrameMaker reaches the end of the document, it continues the search at the beginning. After searching the main text flow, it searches other text in the document. Because FrameMaker searches flow by flow rather than page by page, it may appear to jump around within the document while searching.

## Searching throughout a book

If you are searching throughout a book, FrameMaker begins searching from the active document (or from the first document of the book if the book window is active) and continues searching until all documents in the book have been searched. If a document cannot be opened, the document will be skipped and a message will appear in the Book Error Log.

For more information on working with book wide features, see “Using book wide commands” on page 372.

## Searching for any item

When you search for an item listed in the preceding section, you can customize the search by considering case, matching whole words only, or using wildcards. Wildcards let you search for character patterns and for text that appears at the beginning or end of a line.

When FrameMaker finds an item, you can replace the item or continue searching for other occurrences of the item.

You can search for an item in the selection, in the document, or throughout the entire book. For more information on searching throughout a book, see “Searching throughout a book” on page 63.

### To search for any item:

#### 1 Do one of the following:

- To search in a document, click where you want to begin the search.
- To search within a selection, select the text.
- To search throughout the entire book, open the book or a document that belongs to the book.
- To search through one or more documents in the book, select the documents in the book window.

#### 2 Choose Edit > Find/Change.

3 Specify whether you want to search through the book, document, or selection. The Selection option lets you search through selected text if text is selected in a document, or it lets you search selected files if one or more book files are selected.

4 Choose the item you want to find from the Find pop-up menu (see “About searching” on page 62).

#### 5 Do one of the following:

- If you chose Text, Paragraph Tag, Character Tag, Marker of Type, Marker Text, Cross-Reference of Format, Variable of Name, or Table Tag from the Find pop-up menu, enter the particular item you want to find in the Find text box.

- If you chose Character Format or Conditional Text from the Find pop-up menu, enter additional information in the dialog box that appears. For information, see “Searching for character format properties” on page 66 and “Searching for conditional text” on page 67.

- If you chose any other item from the Find pop-up menu, skip step 6 and proceed to step 7.

6 If you entered text in the Find text box, customize the search by doing the following:

- To find or ignore an item with specific capitalization, select or turn off Consider Case. For example, if you enter **MAIN** in the Find text box and Consider Case is selected, you won’t find *Main*. If Consider Case is turned off, you’ll find **MAIN**, *Main*, and *main*.
- To match only a complete word, enter the word in the Find text box and select Whole Word. For example, if you enter **phone** in the Find text box and select Whole Word, you won’t find *telephone*.
- To find a set of characters that may be part of a longer word or part of more than one word, turn off Whole Word. For example, if you enter **old** in the Find text box and turn off Whole Word, you’ll find words such as *bold* and *oldest* as well as *old*.
- To find an item by using wildcards, enter the text and wildcards in the Find text box and select Use Wildcards. For example, if you enter **Number[1-9]** in the Find text box and select Use Wildcards, you’ll find all occurrences of the word *Number*

followed by any number between 1 and 9. For information, see “Using wildcards in a search” on page 65.

**Note:** In Asian documents with multibyte characters, the bracket characters [ ] do not work as wildcards.

7 Click Find. If FrameMaker finds an exact match, it displays the page that contains the item and selects the item.

For information on how FrameMaker searches in a document or book, see “Searching through a document” on page 63 or “Searching throughout a book” on page 63.

**To find the next occurrence of an item:**

Click Find in the Find/Change dialog box or choose Edit > Find Next.

**To reverse the search direction:**

Select Find Backward in the Find/Change dialog box and click Find.

**To cancel a search:**

Do one of the following:

- (Windows) Press Esc.
- (Macintosh) Press Command+period.
- (UNIX) Press Control+c.

## Entering text in the Find text box

You can enter any characters in the Find text box. However, the following characters require special treatment:

- To find a single backslash (\), enter two backslashes (\\) in the Find text box. A single backslash usually indicates a special character.
- To search for a wildcard character as an ordinary character when the Use Wildcards option is selected, precede the wildcard character with a backslash. For example, to find an asterisk, enter \\* in the Find text box.

## Searching for special characters and nonprinting symbols

You can search for any text, including single characters, phrases, and special characters that aren't on your keyboard. When you enter special characters in a dialog box on UNIX systems, the characters may be represented as a sequence of characters beginning with a backslash (\). In Windows, you'll need to type the backslash sequence—see Appendix A, "Typing in Dialog Boxes."

**USING WILDCARDS IN A SEARCH** When Use Wildcards is selected in the Find/Change dialog box, you can use the following wildcards to find character patterns.

To find	Do this	Example
Zero or more characters, excluding spaces and punctuation	Enter an asterisk (*).	<i>f*t</i> finds words such as <i>fit</i> and <i>feet</i> .
Any single character, excluding spaces and punctuation	Enter a question mark (?).	<i>f??t</i> finds four-letter words that begin with <i>f</i> and end with <i>t</i> —for example, <i>foot</i> and <i>feet</i> .
One or more spaces and punctuation characters	Enter a vertical bar ( ).	<i>*any </i> finds words such as <i>any.</i> and <i>many?</i> . If Whole Word is turned off, it also finds <i>Tiffany</i> , but not <i>anything</i> .
Any one of several characters	Type the characters within brackets ([ and ]).	<i>[rm]ate</i> finds <i>rate</i> , <i>mate</i> , and <i>late</i> . If Whole Word is turned off, it also finds <i>berate</i> , <i>isolate</i> , and <i>material</i> .
Any one character not in a specified group of characters	Precede the characters in brackets with a caret (^).	<i>[^rm]ate</i> finds <i>fate</i> , <i>gate</i> , and <i>date</i> , but not <i>rate</i> , <i>mate</i> , or <i>late</i> .
The beginning of a line	Enter a caret (^).	<i>^f</i> finds any word that starts with <i>f</i> at the beginning of a line. You cannot combine this wildcard with the Whole Word option.
The end of a line	Enter a dollar sign (\$).	<i>f\$</i> finds any word that ends with <i>f</i> at the end of a line. You cannot combine this wildcard with the Whole Word option.

To find nonprinting symbols (such as tab, paragraph, and end-of-flow symbols) and positions (such as the start of a paragraph or word), use the following character sequences.

To find	Enter this sequence
Tab	\t
Forced return	\r
End of paragraph	\p (lowercase)
Start of paragraph	\P (uppercase)
End of flow or end of table cell	\f
Start of word	\<
End of word	\>

For example, you could find empty paragraphs by searching for \P\p (beginning of paragraph followed by end of paragraph).

You can use most of these sequences for both searching and replacing—for example, replacing a forced return symbol with an end-of-paragraph symbol. However, you cannot replace with the end-of-flow, start-of-word, or end-of-word sequence.

### Searching for character format properties

You can search for any character format property—for example, you can search for any text in italics. Or you can search for text with several properties—for example, 12-point Helvetica bold.

You can also search for text with specific properties and capitalization—for example, the word *London* in 10-point italic text. With these specifications, FrameMaker won't find *London* if it's a different size, isn't italic, or is capitalized differently.

To search for text with a specific paragraph or character tag, use the Paragraph Tag or Character Tag find options.

### To search for character format properties:

- 1 Click in text with properties similar to (or the same as) the properties you want to find.
- 2 In the Find/Change dialog box, choose Character Format from the Find pop-up menu.
- 3 Do one of the following:
  - To search for the properties of the current text, leave the properties as they are.
  - To search for text with different properties, change the properties to match that format.
  - To search for text with some properties specified and some overlooked, set the properties you want to overlook to As Is. You set a property to As Is by clicking a check box until it is gray (in Windows and on the Macintosh) or dim (on UNIX systems), by choosing As Is from a pop-up menu, by selecting As Is in a scroll list, or by deleting the text in a text box. For example, if you don't care what color is assigned to the text, choose As Is from the Color pop-up menu.
  - To find text with only a few properties, set all properties to As Is by pressing Shift+F8 (in Windows and on UNIX) or Command+Shift+x (on the Macintosh). Then specify only the properties you want to find.

- 4 Click Set, and then click Find.



After making some changes in the Find Character Format dialog box, you can reset the dialog box to match the format of the current text. To do this, press Shift+F9 (Windows and UNIX) or Command+Shift+v (Macintosh).

#### To search for specific text and character format properties:

- 1 Copy the text with the character format you want to find. You can copy as much text as you like, but FrameMaker uses only the first 126 characters on the Clipboard.
- 2 In the Find/Change dialog box, choose Text & Character Formats on Clipboard from the Find pop-up menu. Don't type the text you want to find in the Find text box.
- 3 Click Find.

### Searching for markers

FrameMaker uses markers for cross-references, indexes, and other purposes. It can find any type of marker or just the marker type you specify. When text symbols are visible, a symbol (T) indicates a marker.

FrameMaker can also find markers with specific marker text.

#### To search for a marker:

- 1 In the Find/Change dialog box, do one of the following:
  - To find any marker in the document, choose Any Marker from the Find pop-up menu, and leave the Find text box blank.

- To find a specific type of marker, choose Marker of Type from the Find pop-up menu, and enter the marker type in the Find text box.

- To find a marker with specific text, choose Marker Text from the Find pop-up menu, and enter the marker text in the Find text box.

- 2 Click Find. If the Marker dialog box is open (Special > Marker), the marker text for the found marker appears there.

**Important:** If you want to replace the text in a found marker, use the Marker dialog box to edit the marker text. If you use the Find/Change dialog box, you'll replace the marker rather than the marker text.

### Searching for conditional text

You can search for visible text that has specific condition tags. When FrameMaker finds visible conditional text, it selects all adjacent text that uses these condition tags.

FrameMaker cannot find conditional table rows.

#### To search for conditional text:

- 1 Make sure that the text with the condition tags you want to find is visible (see "Changing the view of conditional documents" on page 385).
- 2 In the Find/Change dialog box, choose Conditional Text from the Find pop-up menu.
- 3 Do the following:
  - To find text with a particular condition tag, move the condition tag to the In list.
  - To find text that doesn't have a particular condition tag, move the tag to the Not In scroll list.

- If you don't care whether found text has a particular tag, move the tag to the As Is scroll list.
- To find all conditional text, move all tags to the As Is scroll list.
- To find unconditional text, click Unconditional.

To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag. To move all tags from one scroll list to another, select a tag in the list and Shift-click an arrow.

4 Click Set, and then click Find.

### Using the Find/Change command from the keyboard

You can search for items without using the mouse. You use keyboard shortcuts to open the Set Find/Change Parameters dialog box (which contains the same options as the Find/Change dialog box), to move the insertion point between the options, and to start a search. These keyboard shortcuts are useful in macros that automate finding and changing. In Windows and on the Macintosh, you can use a third-party macro application to create macros that work with FrameMaker. On UNIX systems, you can use File > Utilities > Keyboard Macros (see "Using UNIX keyboard macros" on page 531).

#### To use the Find/Change command from the keyboard:

- 1 In a document window, press Esc f i s.
- 2 Fill in the Set Find/Change Parameters dialog box as you would the Find/Change dialog box, and then press Return.

Use keyboard shortcuts to move from setting to setting and to choose items from pop-up menus. For a list of keyboard shortcuts, see online Help.

3 To start the search, do one of the following:

- (Windows) Press Control+Shift+f.
- (Macintosh) Press Command+g.
- (UNIX) Press Esc f i n.

4 To search again, repeat step 3.

### Troubleshooting a search

If you don't find the item even though you're sure it's there, check the Find/Change dialog box for the following possible problems:

- Did you spell the text in the Find text box correctly?
- Did you include too many or too few spaces? Are they the right type of spaces? When you enter text that includes spaces in the Find text box, FrameMaker searches for the text with the same number of spaces in the same places. You can find special spaces such as em spaces and thin spaces as well as regular spaces.
- Are you using the appropriate options? For example, is Whole Word selected when it should be turned off?
- If your document uses conditional text, is the text for which you're searching hidden?
- If you're searching for an item on a master page, is the insertion point on a master page?
- If you want to search throughout the entire book, make sure the Book option is selected in the Find/Change dialog box.

## Changing items y u find

After you find an item, you can change it in several ways. Generally, you find text and replace it with other text, but you can also change the character format of the found item or apply the contents of the Clipboard to the item. For example, you can copy a variable to the Clipboard and replace a word with the variable. Or you can replace a word with a graphic in an anchored frame.

You can change each occurrence of the item as it is found, or have FrameMaker automatically make the change throughout the document, book, or selection.

### To change any item:

1 Specify the item you want to find in the way described in “Searching for any item” on page 63.

2 In the Find/Change dialog box, do one of the following:

- To replace the found item with text, choose To Text and type the text in the Change text box. For information, see “Replacing found items with text” on page 70.
- To change character format properties of the found text, choose Character Format and then specify the properties in the dialog box that appears. For information, see “Changing character format properties” on page 70.
- To apply the contents of the Clipboard to the found item, choose By Pasting. Then select the item you want to paste and copy it to the Clipboard.

3 Click Find to find the first match.

4 Do one of the following:

- To change the found occurrence but not continue searching for the item, click Change.
- To continue searching but not change the found occurrence, click Find.
- To change the found occurrence and continue searching for the item, click Change & Find.
- To change all occurrences of the item, specify the scope of the change (all occurrences in the document, book, or selection) and click Change All. A message will indicate the number of changes.

**Important:** When you change all occurrences, FrameMaker may make changes you didn’t intend—for example, changing occurrences of a word when it is part of a longer word (if you don’t select Whole Word). Also, you can’t undo the changes. For these reasons, consider saving your document and then clicking Find and then Change to replace several found occurrences. When you’re confident that FrameMaker will replace only the items you want, click Change All.

If you click Change or Change & Find when no text is selected in the document, FrameMaker inserts or applies the replacement item at the insertion point.

### To delete a found item:

In the Find/Change dialog box, choose To Text from the Change pop-up menu, leave the Change text box empty, and click Change. You can also simply press Delete.

## Replacing found items with text

You can replace anything that FrameMaker finds with text. For example, you can replace a word with another word or replace a marker with a phrase.

If capitalization is important, you can have FrameMaker use the same capitalization that is used in the original text by selecting the Clone Case option in the Find/Change dialog box. For example, if you select Clone Case and type **tea** in the Find text box and **coffee** in the Change text box, FrameMaker replaces *tea* with *coffee* and *Tea* with *Coffee*.

You can type any text, including special characters not found on the keyboard—for example, em spaces and paragraph symbols. For information on these characters, see “Typing special characters” on page 57 and “Typing special spaces” on page 57. To include a backslash (\) in replacement text, type two backslashes (\\) in the Change text box.

You can’t change marker text (such as an index entry) by using the Find/Change dialog box. If FrameMaker finds the marker text you specify, and if you type different text in the Change text box and click Change, FrameMaker replaces the marker—not the marker text—with the text in the Change text box. To change marker text, use the Special > Marker command (see “Editing and deleting entries” on page 329).

## Changing character format properties

You can change the character format properties of any text that FrameMaker finds. For example, you can search for the name of a product and change the text to italic small caps. Or you can search for all text with particular properties and then change the properties.



*To search for text with a specific paragraph or character tag and then apply a different format, copy the format to the Clipboard and then use the By Pasting change option.*

**To specify the character format properties you want to change:**


**1** Do one of the following:

- If you’re changing several character format properties, click in text that has a character format similar to the one you want to apply to the found text.
- If you’re changing one or two character format properties, click in any text.

**2** In the Find/Change dialog box, choose To Character Format from the Change pop-up menu, specify the character format you want to use, and then click Set.



To prevent FrameMaker from applying a property to found text, set the property to As Is. You set a property to As Is by clicking a check box until it is gray (Windows), dashed (Macintosh), or dim (UNIX); by choosing As Is from a pop-up menu; by selecting As Is in a scroll list; or by deleting the text in a text box. For example, if you don't care what color is assigned to the text, choose As Is from the Color pop-up menu. If you want to change all properties to As Is, press Shift+F8 (in Windows and on UNIX systems) or Command+Shift+x (on the Macintosh).

 *After making some changes in the Change to Character Format dialog box, you can reset the dialog box to match the format of the current text. To do this, press Shift+F9 (in Windows and on UNIX systems) or Command+Shift+v (on the Macintosh).*

## Checking spelling

The FrameMaker Spelling Checker uses several dictionaries to check text for spelling errors. When the Spelling Checker finds a questionable word, it suggests the most likely correction along with some other possibilities. You can select a correction, type your own correction, or leave the word unchanged.

The Spelling Checker helps correct your typing as well as your spelling. For example, you can check for repeated words, unusual hyphenation or capitalization, straight quotation marks (when curved should be used), and extra spaces.

You can spell-check the current page, the open document, the entire book, or selected files within the book.

## Spell-checking throughout a book

If you are spell-checking throughout a book, FrameMaker begins spell-checking from the active document (or from the first document of the book if the book window is active) and continues spell-checking until all documents in the book have been checked. If a document cannot be opened, the document will be skipped and a message will appear in the Book Error Log.

For more information on working with book wide features, see "Using book wide commands" on page 372.

## About FrameMaker dictionaries

When you spell-check a document, FrameMaker compares each word in it with the words in the following dictionaries:

- The *main dictionary* contains words found in a standard dictionary. You can't add words to or delete words from this dictionary.
- The default *site dictionary* contains some technical terms. You can add words common to your site or work group—for example, the company name and product names. In Windows, the site dictionary is normally in the site.dict file in the FrameMaker dict folder. On the Macintosh, it's in the Site Dictionary file in the FrameMaker Dictionaries folder. On UNIX systems, it's in \$FMHOME/fmunit/site.dict.

- Your *personal dictionary* contains words you use often. Because FrameMaker uses this dictionary whenever you spell-check any document, use this dictionary for words that are neither document-specific nor site-specific (for example, your name). You can add or delete words. You can also create several personal dictionaries and switch between them.

- The *document dictionary* contains words that are acceptable in a particular document. FrameMaker uses this dictionary regardless of who is editing the document. You can add words to or delete words from it. Unlike the other dictionaries, the document dictionary is part of the document rather than a separate file.

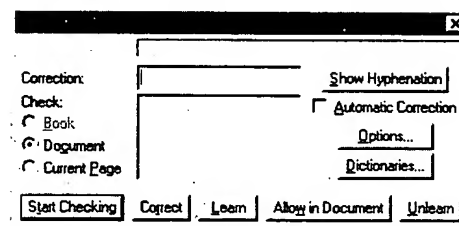
When you are spell-checking throughout a book, words that are added to your personal dictionary will be applied to all documents in a book. Words that are added to the document dictionary will be used only in the current document, not in all the documents in the book. For information on merging your document dictionaries, see “Managing personal and document dictionaries” on page 77.

### Checking for spelling and typing errors

When you spell-check a document, FrameMaker questions any words that aren’t in one of its dictionaries. If a questioned word is spelled correctly, you can confirm its spelling by adding the word to your personal dictionary or to the document dictionary. If a questioned word is misspelled, you can correct it. FrameMaker usually provides suggestions for the correct spelling.

### To check and correct spelling:

1 Choose Edit > Spelling Checker.



2 Do one of the following:

- To check all text in a document, click in the document and then click Document in the Spelling Checker dialog box.
- To check all text on a page, click on the page and then click Current Page in the Spelling Checker dialog box.
- To search throughout the entire book, open the book or a document that belongs to the open book and then click Book in the Spelling Checker dialog box. For more information, see “Using book wide commands” on page 372.
- To check specific text, select the text.
- To check a word, place an insertion point in the word.

In most cases, you’ll want to spell-check the text on the body pages. If a body page isn’t displayed, choose View > Body Pages.

3 Click Start Checking. If you’re checking a selection of text or a single word, do one of the following:

- (Windows and UNIX) Shift-click Start Checking.
- (Macintosh) Option-click Start Checking.

FrameMaker begins spell-checking at the insertion point. When it finds a questionable word, the word appears at the top of the Spelling Checker dialog box. The message to the left of the text box—for example, *Misspelling*—explains why the word has been questioned.

**Note:** *FrameMaker does not spell-check superscript and subscript text or manually micropositioned text (for example, text with a manual baseline shift).*

4 Correct or confirm the spelling in one of the following ways:

- To correct a misspelling, make sure the correctly spelled word is in the Correction text box and click Correct. If the suggested word is not the word you want, you can select a different word in the Correction scroll list or enter the word in the Correction text box. You can also move the insertion point to the document window and type the word correctly there.
- To correct a typing error (for example, repeated words such as *and and*), make sure the correctly typed text is in the Correction text box and click Correct. FrameMaker lists only one suggestion for mistyped text. If the suggestion is not correct, you can enter the correct text in the Correction text box, or type it directly in the document window.

If FrameMaker questions something that you don't consider to be a typing error, you can turn off the option to find that type of potential error. For example, you can stop FrameMaker from questioning the use of straight quotation marks. For information, see "Changing Spelling Checker options" on page 74.

- To add a word to a personal dictionary, make sure the intended word appears next to "Misspelling" at the top of the Spelling Checker dialog box and click Learn.

- To add a word to a document dictionary, make sure the intended word appears next to "Misspelling" at the top of the Spelling Checker dialog box and click Allow in Document.

**Note:** *If FrameMaker adds a word that contains uppercase letters to a personal or document dictionary, when Unusual Capitalization is selected in the Spelling Checker Options dialog box, it considers any other capitalization of the word a spelling mistake. For example, if FrameMaker learns Trinidad, it questions the spelling of TRINIDAD and trinidad. However, if it learns trinidad, in all lowercase letters, it does not question any type of capitalization of the word.*

5 If necessary, click Start Checking to find the next questionable word.

When spell-checking a book, an alert message prompts you to save the document before continuing with the next document. When the last document in the book has been checked, a *Spelling OK* or *Finished checking spelling* message appears.

#### **To check spelling in text insets:**

Open the inset's source file and check the spelling there.

**To cancel the Spelling Checker:**

Do one of the following:

- (Windows) Press Esc.
- (Macintosh) Press Command+period.
- (UNIX) Press Control+c.

**Correcting spelling errors automatically**

You can have FrameMaker automatically correct future occurrences of a misspelled word or typing error. The error won't be questioned in any document you open, and you won't have to provide the correction. FrameMaker keeps track of the errors to correct automatically until you exit or until you instruct FrameMaker to stop making the corrections.

Before you decide to change a particular misspelling or typing error automatically, make sure you know what other changes will be made. For example, if you use the Automatic Correction option when correcting a repeated word, FrameMaker will correct every repeated word even though some may be correct (such as *had had*). Similarly, if *thst* is a misspelling of both *test* and *that*, you won't want to change it automatically to either word.

**To correct spelling errors automatically:**

- 1 Choose Edit > Spelling Checker and click Start Checking.
- 2 When FrameMaker questions a word or typing error, select Automatic Correction and click Correct.

**To stop making automatic corrections before exiting:**

- 1 Choose Edit > Spelling Checker and click Dictionaries.
- 2 In the Dictionary Functions dialog box, click Clear Automatic Corrections, and then click OK.

**Changing Spelling Checker options**

When you spell-check a document, FrameMaker also checks for errors that don't involve spelling—for example, repeated words, extra or misplaced spaces, or unusual capitalization. You can specify the kinds of typing errors for which you want to look.

You can also limit the spell-check so that FrameMaker overlooks certain types of words. For example, you may want to overlook words that contain numbers.

**To change Spelling Checker options:**

- 1 Choose Edit > Spelling Checker and click Options.
- 2 Do the following:
  - In the Find area, specify the kinds of typing errors you want to find. For example, select Unusual Capitalization if you want to find words with uppercase letters in inappropriate locations (for example, *GReen*).
  - In the Ignore area, specify the kinds of words you want to overlook. For example, select Words with Digits if you want to ignore words that contain numbers.

Keep in mind that the more words FrameMaker overlooks, the greater the possibility that your document will contain misspelled words. For example, if you choose to ignore words containing a period, you'll also skip over a sentence that begins without a space after the preceding period.

- If you change the Spelling Checker options and then want to reset the default options, click Get Defaults. If you change the Spelling Checker options in Windows or on the Macintosh, and then exit FrameMaker without resetting the default options, your current settings become the default options.

3 Click Set.

### Rechecking after changing options

FrameMaker ordinarily rechecks only paragraphs that have been edited since the prior check. If you change options after spell-checking a document, you may want to run the Spelling Checker again after instructing FrameMaker to mark all paragraphs for rechecking.

For more information on changing dictionary functions, see "Managing dictionaries" on page 77.

#### To mark all paragraphs for rechecking:

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.
- 3 Click Dictionaries.

4 Select Mark All Paragraphs for Rechecking and click OK.

### Skipping text when spell-checking

If you don't want FrameMaker to spell-check certain text, assign no language to it; that is, change its Language property to None (see "Checking spelling in different languages" on page 75). For example, you may not want to spell-check paragraphs of computer code.

When you set the language of text to None, FrameMaker no longer provides hyphenation for it.

### Checking spelling in different languages

All text is assigned a language. When you spell-check, FrameMaker uses the main dictionary of the language assigned to the text. You can change the language used to spell-check text by changing the language assigned to the text.

The CD-ROM version of FrameMaker contains dictionaries for all supported languages. However, the default Windows and Macintosh installation contains only one dictionary in a single language.

When spell-checking a document with different languages, note the following:

- In an Asian-language document; some special characters may not be displayed in the Spelling Checker as they are in a Western-language document. For example, a backslash will be displayed as a yen symbol, and a nonbreaking hyphen will be displayed as a blank.

- In an Asian-language document that contains Roman text, make sure you turn off the Straight Quotes option in the Spelling Checker dialog box so that the Spelling Checker does not stop on properly spelled words.

#### To change the language of text in a document:

Do one of the following:

- To change the language of a single paragraph or of all the paragraphs in a document, use the Language property in the Default Font properties of the Paragraph Designer (see “Using a designer to change font properties” on page 94).
- To change the language of a range of text within a paragraph, or the language of a text line, use the Language property in the Character Designer (see “Using a designer to change font properties” on page 94).

## Controlling hyphenation

When you add a word to a personal dictionary, FrameMaker calculates the points at which it can hyphenate the word. If the suggested hyphenation points aren't appropriate, you can change them before adding the word. You can also specify that a word is always or never hyphenated. For example, you can hyphenate *heavy-duty* wherever it appears but never hyphenate your company's name.

After you make hyphenation changes, you should rehyphenate the document (see “To rehyphenate an entire document:” on page 77). For additional information on hyphenation, see “Changing hyphenation and line breaks” on page 105.



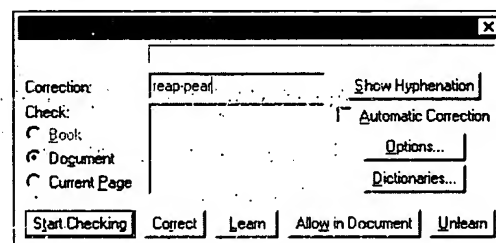
*When you want strict control over hyphenation (for example, before printing the final draft of a book), you may want to search your document for all hyphens that FrameMaker has inserted automatically. To do this, choose Automatic Hyphen from the Find pop-up menu in the Find/Change dialog box.*

#### To show a word's hyphenation points:

Choose Edit > Spelling Checker, type the word in the Word text box, and click Show Hyphenation. If the word is in the main dictionary or your personal dictionary, FrameMaker uses the dictionary to determine the hyphenation points. If the word isn't in one of these dictionaries, FrameMaker calculates the hyphenation points.

#### To change the hyphenation of a word:

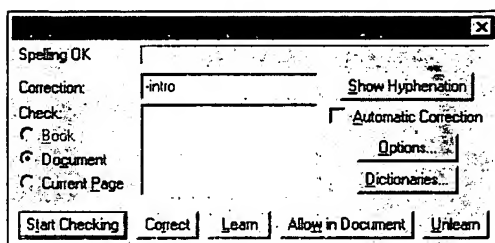
- 1 Show the word's hyphenation points in the way described in the previous procedure.
- 2 Adjust the hyphenation and click Learn. You can add and delete hyphens as necessary.



*Reappear cannot be hyphenated as re-appear.*

**To prevent FrameMaker from ever hyphenating a word:**

Enter the word in the Correction text box, enter a hyphen before the word, and click Learn. Make sure the word doesn't contain any hyphens other than the one before it.



*Word cannot be hyphenated.*

**To rehyphenate an entire document:**

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.
- 3 Click Dictionaries.
- 4 Select Rehyphenate Document, Rehyphenate Selected Files in Book, or Rehyphenate All Files in Book, and then click OK.

**Managing dictionaries**

You have editorial control over your document, personal, and site dictionaries. For example, you can add and delete words and change the hyphenation of words. You can also choose different dictionaries, merge one dictionary into another, and delete dictionaries.

**Managing personal and document dictionaries**

FrameMaker automatically creates a personal dictionary for you and a document dictionary for each of your documents. You can use the Spelling Checker to add or delete words in these dictionaries, or you can manage the dictionaries directly. When you work with a dictionary directly, you can examine and edit its contents or merge it with another dictionary. You can create multiple personal dictionaries and then use them one at a time.

If you make changes to either a personal or document dictionary, mark all paragraphs for rechecking before you spell-check the document again. For instructions, see "Rechecking after changing options" on page 75.

**To delete a word from the personal or document dictionary:**

Choose Edit > Spelling Checker, enter the word in the Correction text box, and click Unlearn.

**To delete the contents of the document dictionary:**

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.
- 3 Click Dictionaries.
- 4 Choose Clear from the Document Dictionary (or Document Dictionaries) pop-up menu and click OK.

#### **To delete a personal dictionary:**

Delete the file that contains the dictionary. (To find the name of the personal dictionary, choose Edit > Spelling Checker and then click Dictionaries. The name of your personal dictionary appears in the Dictionary Functions dialog box.)

#### **To create another personal dictionary:**

1 Place words (with a hyphen at each hyphenation point) in a document. Type as the first line in the document:

<MakerDictionary 2.0>

2 When you save the file, choose Text Only format and click Save. Then click Only between Paragraphs and click Save.

#### **To use a different personal dictionary:**

1 Choose Edit > Spelling Checker and click Dictionaries. The name of your personal dictionary appears in the Dictionary Functions dialog box.

2 Choose Change Dictionary from the Personal Dictionary pop-up menu and click OK.

3 Specify the name of the file that contains the personal dictionary you want to use.

#### **To check the spelling of a document without using the personal dictionary:**

1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.

2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.

3 Click Dictionaries.

4 Choose Set to None from the Personal Dictionary pop-up menu and click OK.

#### **To copy the contents of a dictionary to a file:**

1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.

2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.

3 Click Dictionaries.

4 Choose Write to File from the Personal Dictionary or Document Dictionary pop-up menu and click OK.

5 Specify the file to which you want to copy the dictionary's contents. You can edit this file and then use it as a new dictionary.

If a book window is active when you choose this command, the document dictionaries are copied to a single file.

#### **To merge the contents of a dictionary with the current personal or document dictionary:**

1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.

2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.

3 Click Dictionaries.



4 Choose Merge from File from the Personal Dictionary or Document Dictionary pop-up menu and click OK.

5 Specify the file you want to merge with the current dictionary.



*You can use the Merge from File command to merge a single dictionary into multiple book files so that all the files in your book will share the same dictionary.*

## Managing site dictionaries

You can specify a different site dictionary for each of several projects, among other purposes. You can also edit your site dictionary directly.

If FrameMaker is used across a network at your site, a system administrator probably manages the site dictionary.

### To specify a different site dictionary:

Do one of the following:

- (Windows) Specify the dictionary in the maker.ini file. For details, see the online manual *Customizing FrameMaker Products*.
- (Macintosh) Choose Edit > Spelling Checker and click Dictionaries. Next choose Change Dictionary from the Site Dictionary pop-up menu and click OK. Then select the file that contains the site dictionary you want to use and click Use.
- (UNIX) Edit the Maker.siteDict resource. For details, see the online manual *Customizing FrameMaker Products*.

## Editing dictionary files

You can change the contents of your personal or document dictionary by clicking Learn, Allow in Document, or Unlearn in the Spelling Checker dialog box as you spell-check. You can also edit your personal, document, and site dictionaries directly.

### To edit a dictionary file directly:

- 1 If you're editing a personal or document dictionary, use FrameMaker to write the dictionary's contents to a file. For instructions, see "Managing personal and document dictionaries" on page 77.
- 2 Edit the file. If you use FrameMaker to edit a dictionary, be sure to do the following:
  - When you open the file, select Treat Each Line as a Paragraph in the Reading Text File dialog box and click Read.
  - When you save the file, choose Text Only format. Make sure the file is named correctly and click Save. Then click Only between Paragraphs and click Save.
- 3 Merge the dictionary file with another dictionary. For instructions, see "Managing personal and document dictionaries" on page 77. If you removed words from the dictionary, delete the original dictionary before merging the file. Otherwise, the deleted words remain in the dictionary.

### **Adding unknown words to a dictionary**

If your document contains many correctly spelled words that FrameMaker will question, you can expedite spell-checking by adding these words to a dictionary in a separate operation before you begin to spell-check.

#### **To add all unknown words to a dictionary:**

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose Edit > Spelling Checker. If a book window is active, choose Selection to affect only the selected files or Book to affect the entire book.
- 3 Click Dictionaries.
- 4 Click Write All Unknown Words to File and click OK.
- 5 Specify a filename for the dictionary file, and click OK or Save. FrameMaker creates a dictionary file that contains all the unknown words in the document. The dictionary file doesn't include typing errors such as repeated words, capitalization errors, or extra spaces.
- 6 Edit the dictionary file with a text editor or with FrameMaker (see "Editing dictionary files" on page 79). Delete any words you don't want to add to your dictionary, such as misspelled words.
- 7 In the Spelling Checker dialog box, click Dictionaries.

8 Choose Merge from File from the Personal Dictionary or Document Dictionary pop-up menu, and click OK. If you expect the words to appear in several documents, you should merge the words with a personal dictionary, or you can merge into all the files in a book.

9 Name and save the dictionary file.

### **Adding hyphenated compound words to your personal dictionary**

Your document may contain a hyphenated compound word—a word or phrase made up of multiple words connected by hyphens. By default, FrameMaker spell-checks each word in a hyphenated compound word rather than checking the hyphenated compound word as a whole. For example, when spell-checking the word *heavy-duty*, FrameMaker checks *heavy* and then checks *duty*. By changing the default settings, you can spell-check hyphenated compound words as single words, and you can add hyphenated compound words to your personal dictionary.

#### **To add a hyphenated compound word to your personal dictionary:**

- 1 Choose Edit > Spelling Checker and click Options.
- 2 Select Unusual Hyphenation and click Set. FrameMaker will spell-check hyphenated compound words as single words, rather than checking the individual words.

3 In the Word text box in the Spelling Checker dialog box, enter the hyphenated compound word to be added to your personal dictionary. Include a hyphen at the beginning of the compound word, and type a backslash (\) before each hyphen that connects words.

For example, to add the word *heavy-duty*, type *-heavy\ -duty*. For information on specifying hyphenation points, see “Controlling hyphenation” on page 76.

4 Click Learn.

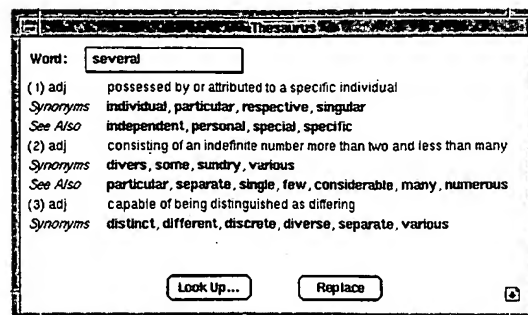
## Using the Thesaurus

You use the Thesaurus to look up synonyms, related words, and antonyms for words you specify. For example, if you specify *figment*, the FrameMaker Thesaurus provides synonyms such as *fiction* and *fable*, related words such as *concoction* and *fantasy*, and antonyms such as *fact*. The Thesaurus lets you improve on a word already in a document or search for the right word to insert. For example, you can replace *figment* with any of its synonyms, related words, or antonyms.

The search for a word doesn't need to end with the first set of synonyms, related words, and antonyms you find. You can look up any one of these words and display *its* synonyms, related words, and antonyms. You can quickly go back to any of the last 10 words you looked up.

## Looking up words

When you look up a word, information about the word appears in the Thesaurus dialog box.



If more information is available than fits, you can use the arrow buttons at the bottom of the dialog box to view the additional information.

FrameMaker displays the synonyms, antonyms, and related words with capitalization that matches the capitalization of the word you looked up.

### To look up a word visible in the document window:

Select the word and choose Edit > Thesaurus.

### To look up a word not visible in the document window:

1 Make sure that no text is selected, and then do one of the following:

- If the Thesaurus dialog box is not open, choose Edit > Thesaurus.
- If the Thesaurus dialog box is open, click Look Up.

2 Enter the word and click Look Up.

**To look up a phrase:**

- 1 Make sure that no text is selected and choose Edit > Thesaurus.
- 2 Enter the phrase, including any hyphens, in the Thesaurus Look Up dialog box, and click Look Up.

*Note: If you try to specify a phrase by selecting it in the document window, FrameMaker looks up only the first selected word.*

**To look up a synonym, a related word, or an antonym displayed in the Thesaurus dialog box:**

Click the word. Synonyms, related words, and antonyms are shown in bold.

**To look up a word again:**

Choose the word from the Word pop-up menu in the Thesaurus dialog box. This menu lists the last 10 words you looked up.

**Choosing a language to use**

FrameMaker uses the language of the current text. If a word isn't selected or the insertion point isn't in a paragraph, FrameMaker uses the language of the interface you chose when you installed FrameMaker. You can override the default language in new documents by creating your own template for custom new documents. For information, see "Changing templates for blank paper and text files" on page 316.

The Thesaurus for a language is installed along with the dictionary for that language. For information, see "Checking spelling in different languages" on page 75.

**To specify a different language when looking up a word:**

- 1 Click Look Up in the Thesaurus dialog box.
- 2 Enter the word you want to look up, choose a language, and click Look Up.

**Using words from the Thesaurus**

You can add or replace a word in your document from the Thesaurus dialog box. The addition or replacement can be either the word looked up or one of the words in bold.

When replacing a selected word in your document with a word from the Thesaurus dialog box, you replace only the selected word—not all occurrences of the word. To replace all occurrences, use Edit > Find/Change (see "Changing items you find" on page 69).

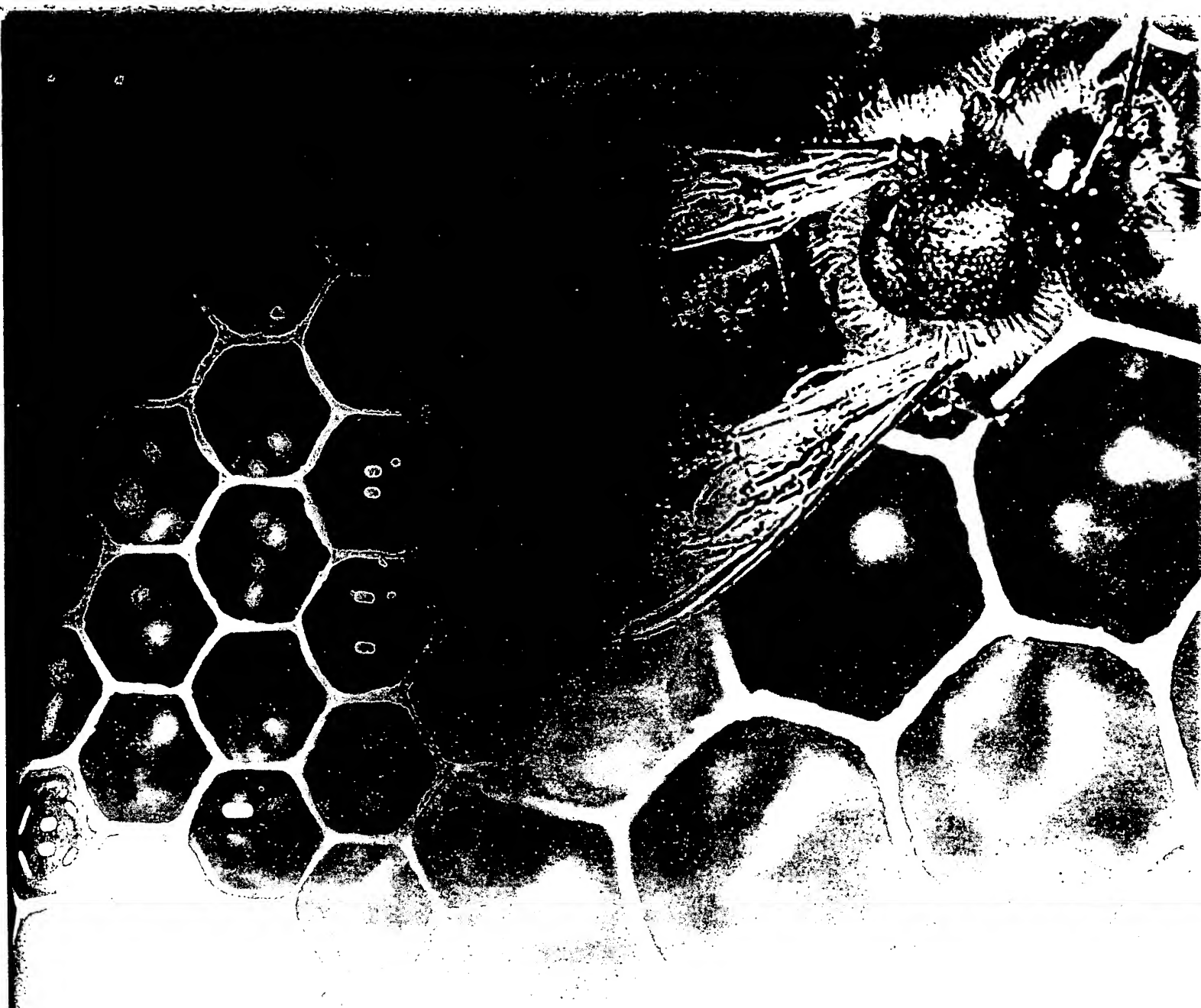
**To insert a word looked up in the Thesaurus dialog box:**

- 1 Do one of the following:
  - To add the word, place an insertion point in the document.
  - To replace a word in the document, select the word.
- 2 Click Replace.

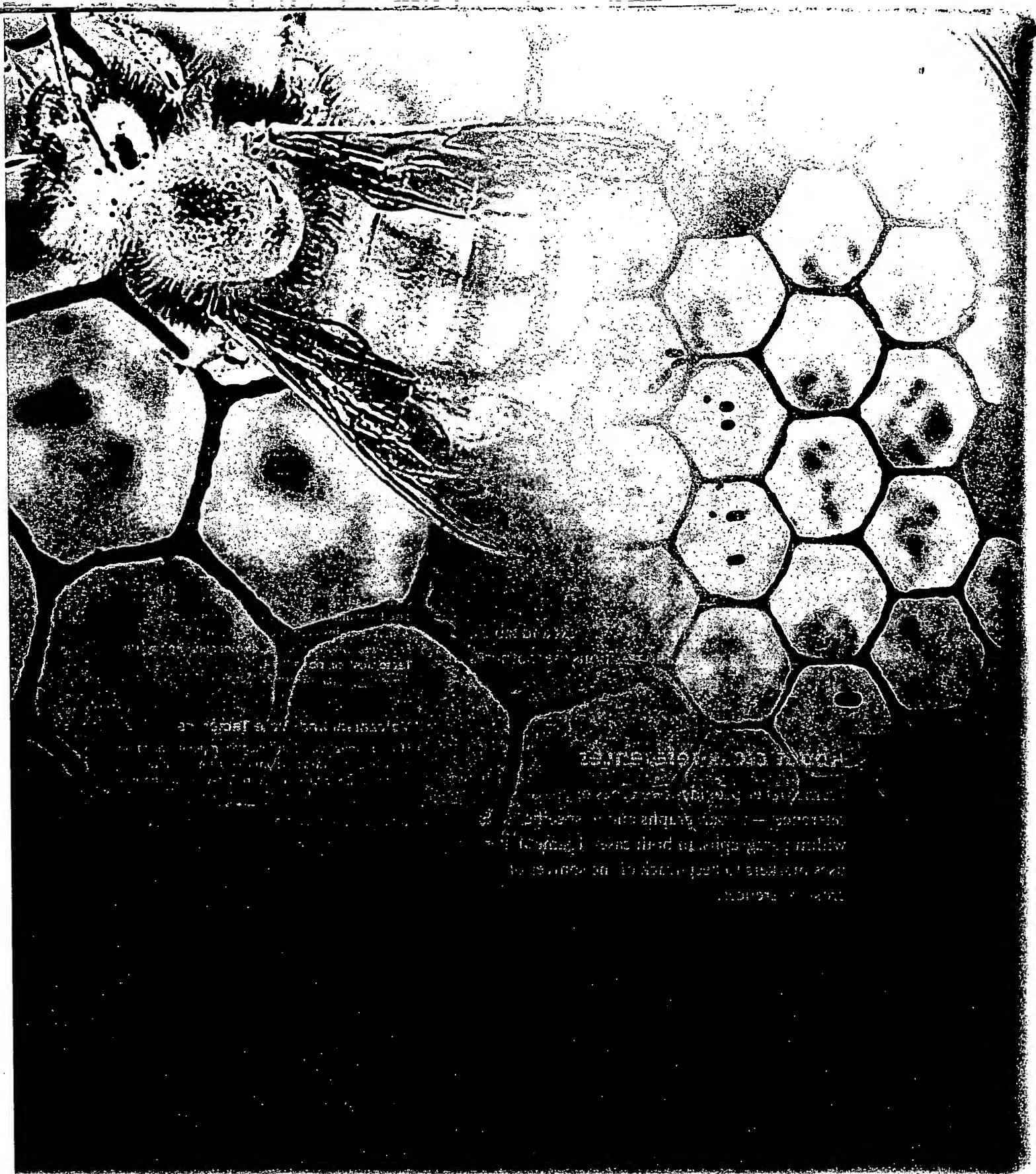
**To insert a word that appears in bold in the Thesaurus dialog box:**

- 1 Do one of the following:
  - To add the word, place an insertion point in the document.
  - To replace a word in the document, select the word.
- 2 Do one of the following:
  - (Windows and UNIX) Control-click the word in the Thesaurus dialog box and click Replace.
  - (Macintosh) Command-click the word in the Thesaurus dialog box and click Replace.





6





# Chapter 6: Cross-References and Footnotes

In FrameMaker, you don't need to type the text of cross-references, and you don't need to revise that text when headings and page numbers change. When you need a cross-reference, you specify its source and the predefined wording to use—for example, whether it contains the heading text, section number, or page number. FrameMaker inserts the text of the cross-reference (for example, *See "Volcanism and plate tectonics" on page 7-71*) for you. Later, if page numbers or headings change when you edit the source documents, FrameMaker can automatically update the cross-references.

You can also add footnotes to body text and tables; FrameMaker numbers and positions the footnotes for you as you type.

## About cross-references

FrameMaker provides two types of cross-references—to paragraphs and to specific spots within paragraphs. In both cases, FrameMaker uses markers to keep track of the sources of cross-references.

## Paragraph cross-references

Paragraph cross-references refer to a heading or some other text that occupies a whole paragraph. If the paragraph extends beyond the page on which it begins and the cross-reference includes a page number, the page number is that of the beginning page. Because most cross-references are to entire one-line or two-line paragraphs—for example, headings, figure titles, and table titles—you'll probably use paragraph cross-references most of the time.

creating an area commonly known as a *hot spot*. The Hawaiian islands, formed by a hot spot which remains active, continue to develop. For more information see **"Volcanism and Plate Tectonics"** on page 7-71.

### Volcanism and Plate Tectonics

How do magmas of different compositions arise? New insights gained from the theory of plate tectonics are providing some answers to these

*Paragraph cross-reference*

## Spot cross-references

Spot cross-references refer to an individual word or phrase—a spot—in a paragraph. For example, use a spot cross-reference if you have a paragraph that spans two pages and you want to refer to the second page of your reference.

### Seismographs

Seismographs have a mass which is freely suspended from a support that is attached to the ground. When the vibration from a distant earthquake reaches the instrument, the *inertia* (see page 13-12)

A property of matter known as *inertia* is defined as follows: objects at rest tend to remain at rest and objects in motion tend to stay in motion unless either is acted upon by an outside force.

*Spot cross-reference*

## Cross-reference markers

FrameMaker uses a marker (of type Cross-Ref) to keep track of the source of each cross-reference. If you move a marker and then update cross-references, the marker's new location is used to update the cross-reference.

For paragraph cross-references, the marker text contains a number assigned to the marker, and the paragraph tag and text of the paragraph being cross-referenced. (The marker text is not updated, so the tag and text may not match the cross-reference.) For spot cross-references, the marker text is the text you typed for the marker.

When you insert a paragraph cross-reference, a cross-reference marker is inserted for you automatically at the beginning of the paragraph if necessary. Before you insert a spot cross-reference, however, you must insert a marker manually to mark the spot.

Within a document, when you copy and paste text that contains a cross-reference marker, the marker is not duplicated. The cross-reference continues to refer to the text in its original location.

## Inserting cross-references

Paragraph cross-references are easier to create than spot cross-references because you don't have to manually mark a particular spot. Paragraph cross-references also make it easier to edit a document that contains them, because you don't have to work around an easy-to-miss marker in the middle of a paragraph as you do with spot cross-references.

*Note:* If you use the next procedure to insert a paragraph cross-reference to a text inset, the cross-reference marker will be lost when the text inset is updated. To prevent the marker from being lost, you must first insert a cross-reference to the paragraph in the text inset's source document in the way described in "To insert a cross-reference to a paragraph in a text inset:" on page 170.

**T Insert a paragraph cross-reference:**

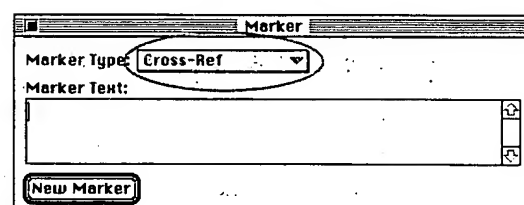
- 1 If you're cross-referencing another document, open that document. You must have write permission to the document in order to add a cross-reference marker to it.
- 2 Click where you want to insert the cross-reference. You can insert a cross-reference in text frames but not in text lines (graphic objects created with the Text Line drawing tool).
- 3 Choose Special > Cross-Reference.
- 4 If you're cross-referencing information in another document, choose the name of that document from the Document pop-up menu.
- 5 Choose Paragraphs from the Source Type pop-up menu. All the tags in the document's Paragraph Catalog appear in the scroll list.
- 6 In the Paragraph Tags scroll list, select the tag of the paragraph you want to cross-reference. For example, if you're cross-referencing a paragraph tagged Head1, select Head1 in the Paragraph Tags scroll list. All Head1 paragraphs then appear in the Paragraphs scroll list.
- 7 In the Paragraphs scroll list, select the paragraph to cross-reference.
- 8 Choose the format of the cross-reference from the Format pop-up menu. The menu lists the cross-reference formats in the current document.
- 9 Click Insert. FrameMaker puts the cross-reference at the insertion point and a marker (T) at the start of the paragraph to which the cross-reference refers. FrameMaker inserts a marker only if a cross-reference marker isn't already there.

**To insert a spot cross-reference:**

- 1 Click where you want to insert the marker. For example, if you want to direct readers to a definition, click at the start of the defined word. Or, if you want to direct readers to an anchored frame, click next to the anchored frame symbol. You can put a marker anywhere within a column of text.

If you want to insert a cross-reference marker in a text inset, insert the marker in the source document (see "Displaying the source of a cross-reference" on page 170).

- 2 Choose Special > Marker.
- 3 Choose Cross-Ref from the Marker Type pop-up menu.




- 4 Enter an identifying word or phrase for the marker in the Marker Text box. The marker text can be up to 255 characters long. (Each character in a Japanese font counts as two characters.)

For example, if you insert a marker where *inertia* is defined, you can enter **Definition of inertia**. This text appears in the Cross-Reference dialog box to help you identify the source. It doesn't appear in the cross-reference itself.

- 5 Click New Marker. A marker symbol (T) appears at the insertion point when text symbols are visible.

6 Insert a cross-reference as if it were a paragraph cross-reference (see “Paragraph cross-references” on page 167) but in step 5, choose Cross-Reference Markers from the Source Type pop-up menu. Then select the marker text in the Cross-Reference Markers scroll list, choose a cross-reference format, and click Insert.

 *To display the information that is kept in cross-reference markers, you can generate a list of Cross-Ref markers (see “Resolving cross-references” on page 177). Alternatively, you can use Edit > Find/Change to find markers of type Cross-Ref (see “About searching” on page 62).*

**To insert a cross-reference to a paragraph in a text inset:**

- 1 Open the source of the inset by double-clicking the inset and then clicking Open Source.
- 2 Insert a cross-reference to the paragraph anywhere in the source document.
- 3 Delete the cross-reference text. The marker will remain.
- 4 Save the source document and then update the text inset by using Edit > Update References in the document that contains the text inset.
- 5 Insert another cross-reference to the paragraph, this time in the document that contains the inset. The cross-reference uses the marker in the updated inset.

## Displaying the source of a cross-reference

You can easily display the source of any cross-reference, even if the source is in a different document.

**To display the source of a cross-reference:**

- Double-click the cross-reference and then click Go to Source. You can also use one of the following shortcuts:
- (Windows) Alt-Control-click the cross-reference.
- (Macintosh) Control-Option-click the cross-reference.
- (UNIX) Control-right-click the cross-reference.

FrameMaker displays the page that contains the source of the cross-reference. To display the source in a different window, hold down Shift while using one of the preceding shortcuts.

## Editing cross-references

You copy, move, and delete cross-references just as you do regular text. You can also edit a cross-reference in the following ways:

- Reword the cross-reference by choosing a different cross-reference format.
- Refer to different information by choosing a different source.

If you want to edit the text of the cross-reference as you do regular text, you must convert it to text. After conversion, the text can no longer be updated as a cross-reference.

### To select a cross-reference:

Click it once.

### To choose a different source or format for a cross-reference:

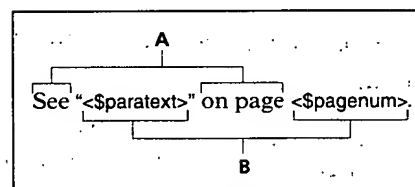
- 1 Double-click the cross-reference.
- 2 Specify a source or format in the same way that you would when inserting a cross-reference (see "Inserting cross-references" on page 168).
- 3 Click Replace.

### To convert a cross-reference to text:

- 1 If you're converting a single cross-reference, select it; otherwise, click in the document.
- 2 Choose Special > Cross-Reference.
- 3 Click Convert to Text.
- 4 Indicate the scope of cross-references to convert and click Convert.

## Creating cross-reference formats

Cross-reference formats help maintain a consistent cross-reference style throughout a document by determining the appearance of each cross-reference—its wording, the information it contains, and its character format. For example, the format of the cross-reference *See "Volcanism and plate tectonics" on page 7-71* determines that the section title is in quotation marks. The cross-reference format also provides the words *See* and *on page*, and it provides building blocks that represent the actual section title and page number.



A. Text you type B. Building blocks

A cross-reference format consists of a name and a definition. The entire definition, including building blocks, can be up to 255 characters long.



FrameMaker templates include several cross-reference formats. You can change them or create others. If another document contains the cross-reference formats you want, you can import them into your document (see "Importing and updating formats" on page 317 and "Changing the format of files in a book" on page 371).

### To create a cross-reference format:

- 1 Choose Special > Cross-Reference.
- 2 Click Edit Format.

3 Type a name for the cross-reference format in the Name text box. Format names are case-sensitive; *page* and *Page* would be different formats.

4 Do the following:

- To use text (such as *See* or *on page*) in a cross-reference format, click in the Definition text box and enter the text. For information, see “Including text in a cross-reference” on page 172.
- To include a building block that refers to source information, such as a page number, chapter number, or heading text, click in the Definition text box and then click the building block in the Building Blocks scroll list. The building block appears at the insertion point. For information, see “Using building blocks for source information” on page 173.
- To change the character format within the cross-reference, click in the Definition text box and then click the character format at the bottom of the Building Blocks scroll list. The building block appears at the insertion point. To return to the default paragraph format before the end of the cross-reference, insert <Default ¶ Font> in the definition. For information, see “Using building blocks for character formats” on page 174.

5 Click Add and then click Done. The new cross-reference format appears in the Formats pop-up menu in the Cross-Reference dialog box.

## Including text in a cross-reference

You can include specific characters or words in the cross-reference. In most cases, you simply enter the text in the Definition text box. But a few characters are entered or displayed differently.

For example, an angle bracket (< or >) in a cross-reference format ordinarily signals a building block. To include an angle bracket as part of the text, precede it with a backslash (\).

For information on adding volume and chapter numbers to cross-references, see “Including volume and chapter numbers in cross-references” on page 370.

**Note:** In Windows and on UNIX systems, some special characters are entered or displayed differently in dialog boxes. In Windows, you enter a sequence of characters beginning with a backslash (\); these sequences are listed in Appendix A, “Typing in Dialog Boxes.” On UNIX systems, the backslash sequences may appear in text boxes, even though you don’t have to type the sequences to enter the characters.

## Using building blocks for source information

You use building blocks to include information about the source of the cross-reference, such as its paragraph text (but not the cross-reference marker text), paragraph autonumber, or volume, chapter, or page number. Building blocks for source information appear in angle brackets (< and >) and begin with a dollar sign (\$). The following building blocks are grouped by the type of information they represent.

**Source file** FrameMaker provides the following building blocks for referring to the source file.

Building block	Meaning
<\$filename>	The name of the source document
<\$fullfilename>	The full pathname of the source document
<\$volnum>	The volume number of the document that includes the source paragraph
<\$chapnum>	The chapter number of the document that includes the source paragraph

**Source paragraph** FrameMaker provides the following building blocks for referring to the source paragraph.

Building block	Meaning
<\$pagenum>	The page number of the source paragraph
<\$paratext>	The text of the source paragraph, excluding its autonumber (If the character format of text in the source paragraph was changed by applying a Character Catalog format, the font family, superscript, and subscript properties are preserved in the text of the cross-reference.)
<\$paratag>	The tag of the source paragraph
<\$paranum>	The source paragraph's entire autonumber, including any text in the autonumber format
<\$paranumonly>	The source paragraph's autonumber counters, including any characters between them

**Paragraph preceding the source paragraph** A cross-reference to a subsection often needs to identify the section that contains it. For example, a cross-reference to a subheading might identify the main heading under which it is found, as in the following: See *"Types of plate boundaries"* in *"Plate tectonics."* In the example, *Types of plate boundaries* is the source paragraph, and *Plate tectonics* is the main heading under which the source paragraph appears.

FrameMaker provides the following building blocks for referring to a paragraph preceding the source. In each of the building blocks, replace *tag* (in brackets) with the tag of the paragraph to which you want to refer, but don't delete the brackets. For example, if you want to refer to the text of the preceding paragraph tagged Head1, use `<$paratext[Head1]>`.

Building block	Meaning
<code>&lt;\$pagenum[tag]&gt;</code>	The page number of the preceding paragraph with the specified tag
<code>&lt;\$paratext[tag]&gt;</code>	The text of the preceding paragraph with the specified tag, excluding its autonumber (If the character format of text in the source paragraph was changed by applying a Character Catalog format, the font family, superscript, and subscript properties are preserved in the text of the cross-reference.)
<code>&lt;\$paratag[tag]&gt;</code>	The tag of the preceding paragraph with the specified tag
<code>&lt;\$paranum[tag]&gt;</code>	The entire autonumber of the preceding paragraph with the specified tag, including any text in the autonumber format
<code>&lt;\$paranumonly[tag]&gt;</code>	The autonumber counters of the preceding paragraph with the specified tag, including any characters between them

**Important:** Don't use a paragraph tag that includes brackets.

## Using building blocks for character formats

All formats in the document's Character Catalog appear at the end of the Building Blocks scroll list. You insert them as you do other building blocks.

If you don't insert a character format in a cross-reference format, FrameMaker uses the font at the insertion point when a cross-reference is inserted with that format. If you change the character format for the cross-reference, the change applies only to the cross-reference, not to the text following it in the paragraph.

**Important:** Don't use a character tag that includes angle brackets.

## Examples of cross-reference formats

The first four examples in the following table include building blocks that refer to the source paragraph. The first example uses a chapter number building block and the source paragraph's text (see "Including volume and chapter numbers in cross-references" on page 370). The second includes the source paragraph's text and autonumber. The third includes only the source paragraph's text. The fourth includes only the page number of the source paragraph.

Example	Format
Chapter 4, "Climatic Effects."	<code>&lt;\$chapnum&gt;, "&lt;\$paratext&gt;."</code>
Section 2.3.4, <i>Volcanoes</i> .	<code>"Section &lt;\$paranumonly&gt;, &lt;TitleFont&gt;&lt;\$paratext&gt;."</code>
See <i>Plate tectonics</i> , next.	<code>See &lt;TitleFont&gt;&lt;\$paratext&gt; &lt;Default ¶ Font&gt;, next.</code>



Example	Format
page 23	page <\$pagenum>
See "Magma" in "Volcanoes."	See "<\$paratext>" in "<\$paratext[Head1]>."

The last example includes a building block that refers to a paragraph preceding the source paragraph. In this example, the cross-reference format could also be the following:

See "<\$paratext>" in "<\$paratext[Title, Head1]>."

In this case, the cross-reference refers to either the chapter title (Title) or the section heading (Head1), whichever is closer to the *Magma* source paragraph.

You can use the </> building block as a substitute for <Default Para Font> in cross-reference definitions.

## Editing cross-reference formats

When you change or delete cross-reference formats, the changes are reflected immediately in all cross-references that use the affected formats.

You can change the format of cross-references in a text inset (text imported by reference) if the inset uses the formats of the document into which it is imported. If the inset uses formats from the source document, you need to change the formats in the source document.

### To change a cross-reference format:

- 1 Choose Special > Cross-Reference and click Edit Format.
- 2 In the Formats scroll list, select the format you want to change, and then edit the definition. You can use text and building blocks in the same way you do when creating a cross-reference format (see "Creating cross-reference formats" on page 171).
- 3 Click Change, and then click Done. If cross-references in the document use the format, the Update Cross-Reference dialog box appears. Indicate the scope of cross-references to update, and then click Update.

### To delete a cross-reference format:

- 1 Choose Special > Cross-Reference and click Edit Format.
- 2 In the Formats scroll list, select the format you want to delete.
- 3 Click Delete, and then click Done. If cross-references in the document use the format, you are asked whether you want to convert these cross-references to text.

## Maintaining cross-references

If you edit the source of a cross-reference or if the pagination of the source document changes, the cross-reference may no longer be accurate. You can update cross-references to be sure that they show correct information from the source.

Normally, FrameMaker updates all cross-references when you open a document. It also updates all internal cross-references and cross-references to open documents when you print a document. You can also update cross-references manually. If the document contains unresolved cross-references—cross-references to sources that FrameMaker can't find—you'll need to help locate the sources.

**Note:** *FrameMaker does not update cross-references when opening a document in the following circumstances: when fonts or dictionaries are missing, when opening a document saved with an earlier version of FrameMaker, and when opening a MIF file.*

### Suppressing automatic updating of cross-references

If a document contains many cross-references, you can improve its opening time by suppressing automatic updating of the cross-references. After you suppress automatic updating, cross-references are no longer updated when you open the document. However, internal cross-references and cross-references to open documents are still updated automatically when you print.

#### To suppress automatic updating of cross-references in a document:

- 1 To suppress updating in a document, choose Edit > Update References.
- 2 Choose Suppress Automatic Updating from the Commands pop-up menu.

3 Select Suppress Automatic Updating of All Cross-References, and then click Set. Click Done. Cross-references will be updated only when you print or when you manually give instructions to update.

#### To suppress automatic updating of cross-references in a book:

- 1 In a book window, choose Edit > Suppress Automatic Reference Updating.
- 2 Select Suppress Automatic Updating, and then click Set. Cross-references will be updated only when you print or when you manually give instructions to update.

### Updating cross-references manually

You should update all cross-references in a document before distributing the document. You should also routinely update after editing the document or editing any other documents that are sources for the cross-references. For information on updating cross-references in a book, see "Updating books" on page 372.

FrameMaker does not update cross-references when opening a document in the following circumstances:

- When cross-references refer to information in hidden conditional text. Show the text that contains the sources of the cross-references before updating the cross-references.
- When fonts or dictionaries are missing.
- When opening a document saved with an earlier version of FrameMaker.
- When opening a MIF file.

**To update cross-references in a document manually:**

- 1 Choose Edit > Update References.
- 2 Select All Cross-References, and then click Update. If FrameMaker resolves all the cross-references, you're finished. If FrameMaker can't resolve all the cross-references, the Update Unresolved Cross-References dialog box appears. To resolve the cross-references, follow the instructions in the next section.

**Resolving cross-references**

Occasionally, FrameMaker can't update a cross-reference for one of the following reasons:

- The marker indicating the source of the cross-references has been moved to a different file, or the file itself has been moved or renamed.
- The marker indicating the source has been deleted.

When FrameMaker can't resolve a cross-reference during an automatic update (when opening or printing), an alert message appears. You can resolve the cross-references after dismissing the message.

If you want to inspect all the unresolved cross-references at the same time, you can generate a list of unresolved cross-references.

**To resolve a cross-reference when a marker has been moved to another file or the file has been renamed:**

- 1 Choose Edit > Update References.
- 2 Choose Update Unresolved Cross-References from the Commands pop-up menu.

- 3 In the Total of Unresolved Cross-References scroll list, select the file that used to contain the source of an unresolved cross-reference. The text below the scroll list indicates how many cross-references to the selected file are unresolved.

**4 Do one of the following:**

- (Windows and UNIX) In the Look In scroll list, select the file that contains the source, and click Open.
- (Macintosh) Click Change to File, select the file in the scroll list, and click Select.

If FrameMaker can't perform the update, select a different file in the Look In scroll list, and then try again.

- 5 To resolve cross-references to any other file listed in the Total of Unresolved Cross-References scroll list, repeat steps 3 and 4. Then click Done.

**To resolve a cross-reference when a marker has been deleted:**

- 1 Choose Edit > Find/Change.
- 2 Choose Unresolved Cross-Reference from the Find pop-up menu and click Find. FrameMaker finds the first unresolved cross-reference and selects it. The marker text of the last-used source marker for the cross-reference appears in the Find text box to help you locate the source.
- 3 If you no longer need the cross-reference because the source text itself was deleted, delete the cross-reference. Otherwise, do one of the following:

- If FrameMaker finds an unresolved paragraph cross-reference, double-click the cross-reference to display the Cross-Reference dialog box, specify a different source, and click Replace.
  - If FrameMaker finds an unresolved spot cross-reference, insert a new cross-reference marker in the appropriate text (see “Inserting cross-references” on page 168). Use exactly the same marker text that appears in the Find/Change dialog box.
- 4 Repeat steps 2 and 3 until all unresolved cross-references are resolved.

#### To generate a list of unresolved cross-references:

1 Choose Special > List of > References. When prompted, specify whether you want to create the generated file as a standalone document or add it to a book.

2 Move Unresolved Cross-Refs to the Include References scroll list, and then click Set.

The generated list includes the page number of each unresolved cross-reference, indicates whether each missing source is internal (in the current document) or external (in a different document), and includes additional information—for

example, the tag and text of the source paragraph. The tag and text may be inaccurate because they aren’t updated after you initially insert the cross-reference. For spot cross-references, the list includes the marker text.

Volcanoes (Head2: Climatic effects) 87  
Glaciers (Head1: Erosion) 89  
Volcanoes (Head2: Volcanic eruptions)  
Glaciers (Title: Glaciers) 91  
Volcanoes (Head1: Magma) 92  
Earthquakes (Title: Earthquakes) 96  
Earthquakes (Title: Earthquakes) 98  
Glaciers (Title: Glaciers) 99

Generated list of unresolved cross-references

## Working with footnotes

When you insert a footnote reference and footnote, FrameMaker gives it a number, formats the text of the footnote, and inserts a separator if the footnote is the first one in a column.

the evening, loosening deb  
wrecked buildings.<sup>1</sup>

1. Courtesy of The Associated Press

A

B

C

A. Footnote B. Footnote separator C. Footnote reference

As you insert, move, and delete footnotes, FrameMaker adjusts the numbering. As you edit the surrounding text, FrameMaker moves the footnotes from page to page as needed.

The footnote reference and the footnote itself usually appear in the same column. When you insert a footnote reference in a table, the footnote appears at the end of the table. If the table flows onto a second page, all the footnotes appear on the second page regardless of the page on which the footnote reference appears.

FrameMaker allows document footnotes to be numbered consecutively across all files in a book. See “Changing the footnote numbering style” on page 182.

**To insert a footnote:**

- 1 Click where you want the footnote reference to appear. You can insert a footnote reference in a column of text or in a table cell.
- 2 Choose **Special > Footnote**. FrameMaker inserts the footnote reference, displays the footnote number at the bottom of the column or below the table, places the insertion point after the footnote number, and rennumbers any footnotes that follow. (Footnotes are numbered consecutively in a text flow. If your document contains several text flows, footnote numbering in each flow will be independent of the others.)

- 3 Type the text of the footnote at the insertion point. When you finish typing the footnote, return to the main text by clicking in it or by choosing **Special > Footnote** again.



*To place two footnote references together, place a space or a comma between them—for example, references <sup>5</sup> <sup>6</sup> or references <sup>5,6</sup>. Otherwise, the second footnote won't be created. If you place a comma between the footnote references, you should manually format the comma in superscript.*

**To change a footnote:**

Select the footnote text and edit it as you do other text. You can't change a footnote number, because FrameMaker maintains the numbering.

**To duplicate, move, or delete a footnote:**

- 1 Select the footnote reference (not the footnote text).
- 2 Do one of the following:
  - To duplicate or move the footnote, use **Edit > Copy**, **Edit > Cut**, and **Edit > Paste**.
  - To delete the footnote, press **Delete**.

## Keeping a footnote in the same column as its reference

FrameMaker sometimes can't keep footnotes in the same column as the corresponding footnote reference. For example, if you insert a footnote reference at the bottom of a column of text so there is no space for the footnote below it, FrameMaker moves the footnote to the bottom of the next column. In such cases, you can force a column or page break before the footnote reference to keep the reference and the footnote together in the same column.

Adding text to a footnote may cause the last footnote in a column or on a page to move to the bottom of the next column or page. To reduce the chance of a footnote not fitting in a column, allocate more space for footnotes in a column (see "Changing footnote properties" on page 181).

## Inserting more than one reference to a footnote

You can create a single footnote that has several footnote references—for example, a table footnote with references in several cells.

Type	Depth in Kilometers	Greatest Richter Magnitude
Shallow	0-60 <sup>a</sup>	8.6
Intermediate	60-300 <sup>a</sup>	7.5
Deep	300 or more	6.9

a. Approximately 90% of all earthquakes occur at depths between 0 and 100 Kilometers

*Two references for one footnote*

You create multiple footnote references by inserting the first reference in the usual way and then using cross-references for additional footnote references.

### To insert more than one reference to a footnote:

- 1 Insert the first footnote reference.
- 2 If necessary, create a cross-reference format for additional footnote references.

The cross-reference format must display the footnote number correctly. For example, if footnote references are displayed in superscript, and if the document contains a Superscript character format, a cross-reference format defined as <Superscript><\$paranumonly> displays the autonumber of a paragraph as a superscript. When you use it to refer to a paragraph that contains a footnote, it displays the footnote number in superscript.

- 3 Click where you want to insert the additional footnote reference.
- 4 Choose Special > Cross-Reference to insert a cross-reference to the footnote where you clicked. Use the cross-reference format you created in step 2.
- 5 Click Insert. FrameMaker inserts a cross-reference that is identical to the original footnote reference.

## Maintaining cross-references to footnotes after editing

After you edit a document, make sure the additional references to footnotes are accurate. For example, a cross-reference to a footnote reference may be misnumbered, or the footnote—unless the reference is in a table—may be on the wrong page. If a cross-reference is misnumbered, update the cross-references in the document (see “Maintaining cross-references” on page 175). If the footnote is on the wrong page, fix the page break or move the footnote.

## Changing footnote formats


You can change any of the footnote properties—for example, the style of numbers, the numbering format, or the paragraph format to use for footnote text. And you have complete control over the size and contents of the separator—the area between the bottom of the column or table and the first footnote.

FrameMaker uses different formats for document and table footnotes.

## Changing footnote properties

When you change footnote properties, all the changes except the paragraph format are applied to both new and existing footnotes.

### To change footnote properties:

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
  - 2 Choose Format > Document > Footnote Properties. To edit table footnote properties, choose Table Footnote from the pop-up menu.
  - 3 Do the following:
    - To adjust the maximum height allowed for footnotes in a column, enter a value in the Maximum Height Per Column text box.
    - To use a different paragraph format for new footnotes, enter the format’s tag in the Paragraph Format text box. (The format must be stored in the document’s Paragraph Catalog.) To use a different format for an existing footnote, apply the format to it directly.
-  *By default, documents may include paragraph formats named Footnote and TableFootnote to be used for new footnotes. To change the look of footnotes, change these formats. See Chapter 4, “Text Formatting.”*
- Specify the format of the footnote reference in the main text and of the footnote number in the footnote. Either number can be in the superscript, baseline, or subscript position, and either can have a prefix and suffix.
- 4 Click Set.

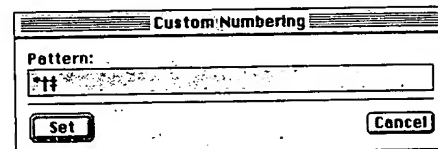
## Changing the footnote numbering style

You use the Numbering Properties dialog box to change footnote and table footnote numbering styles.

*Note: If you're working with documents that are part of a book, it's a good idea to set the properties from the book window rather than directly from the document window. When the book is updated, the book properties will override the document properties.*

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Choose Format > Document > Numbering. Choose either Footnote or Table Footnote from the pop-up menu.
- 3 Choose a numbering style from the Format pop-up menu. If you choose Custom, you can specify a set of custom footnotes in the Custom Numbering dialog box; click Set when you're done.

Your custom style can use any combination of numbers, letters, and symbols, which will be used in the order you enter them. If you use symbols in a custom style and your document contains more footnotes than symbols, the symbols are repeated. For example, if you use the two symbols \* and †, and the document contains three footnotes, the third footnote is marked \*\*. The footnote number will appear in the default font of the footnote's paragraph format.



Custom footnote numbering

*Note: In Windows and on UNIX systems, some special characters are entered or displayed differently in dialog boxes. In Windows, you enter a sequence of characters beginning with a backslash (\); these sequences are listed in Appendix A, "Typing in Dialog Boxes." On UNIX systems, the backslash sequences may appear in text boxes, even though you don't have to type the sequences to enter the characters.*



4 Choose whether you want document footnote numbers to be restarted on each page, start numbering footnotes at a specific number, or continued from the previous chapter in the book. When you number sequentially, you can start from any number. The numbering of table footnotes always starts over with each table.

5 Click Set.

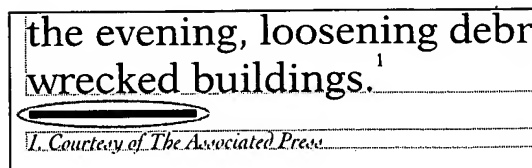
### Changing the footnote separator

The footnote separator is a graphic frame automatically placed between the bottom of the body text or table and the first footnote. It usually contains a line or other design element to provide visual separation between the body text and footnotes. The height of the frame determines the space between the body text or table and the footnote.

Separator frames for document and table footnotes are stored on a reference page (see “Working with reference pages” on page 302). Their names are the same as the paragraph formats used for these footnotes—by default, Footnote and TableFootnote.



Reference page




Footnote separator on body page

### To change the footnote separator:

1 Choose View > Reference Pages and display the page that contains the footnote separator frame.

2 Resize the frame or edit its contents—see Chapter 8, “Graphics.” You can change the size or position of the line in the frame, or remove or replace the line. If you reduce the height of the frame, the first footnote is positioned closer to the bottom of the text or table. If you move the line downward in the frame, the first footnote stays in the same position but the line moves closer to it.

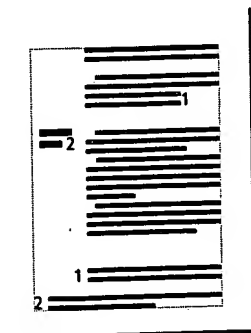
 *To add space, but not a line, between the body text or table and the footnotes, leave the separator frame empty.*

3 Choose View > Body Pages.

### Using footnotes in multicolumn layouts

The placement of footnotes in multicolumn layouts depends on the location of the footnote reference and on the presence or absence of side heads or text that straddles columns.

**Side heads** In a single-column document with side heads, footnotes in the body column run the width of the body column, but footnotes in a side head span the side-head area *and* the body column.

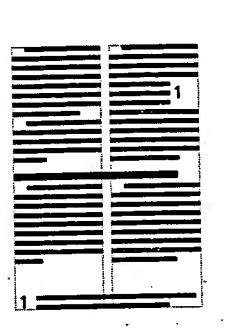


*Footnotes in side head span body column and side-head area.*

If you want a footnote in a side head to be aligned with footnotes in the body column, change the indents of the footnote in the side head area by adding a distance equal to the width of the side-head area plus the gap (see “Changing indents and alignment” on page 98).

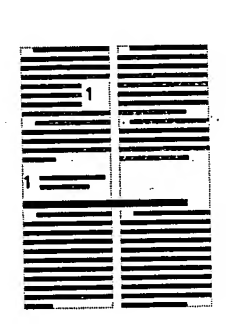
**Straddles** In a multicolumn format where some text straddles all columns and other text does not, footnotes may or may not straddle the columns. Footnotes whose references appear in straddle text always straddle the columns, and these footnotes appear at the bottom of the text frame. Footnotes whose references appear in nonstraddle text

straddle the columns if the footnotes’ paragraph format is set to Across All Columns (in the Pagination properties of the Paragraph Designer).



*Footnote across all columns*

If the paragraph format is set to In Column, the footnote appears either just above the next straddle paragraph (if there is one on the page) or at the bottom of the column.



*Footnote in column*

If the footnotes appear out of order, select Across All Columns for the footnote paragraph format to force all footnotes to appear in numerical order at the bottom of the page.

## Working with endnotes

Endnotes appear at the end of a document rather than at the bottom of a page or below a table. You type the endnotes at the end of the document just as you would any other paragraphs, give the endnotes paragraph autonumbers, and then use cross-references to the autonumbered paragraphs as endnote references.

FrameMaker does not automatically maintain endnotes. If you change the order of endnote references while editing the document, you'll need to rearrange the endnotes in matching order. If you delete an endnote, you'll need to delete the reference to it manually. If you're not willing to maintain the endnotes in these ways, use footnotes. FrameMaker automatically maintains footnote order and numbering.

### To create endnotes:

- 1 Type the first endnote at the end of the document and assign it the paragraph format for endnotes. The paragraph format should include an autonumber so the endnotes will be numbered consecutively.

- 2 Click where you want to insert the endnote reference and cross-reference the endnote. Use the cross-reference format you created for endnotes.

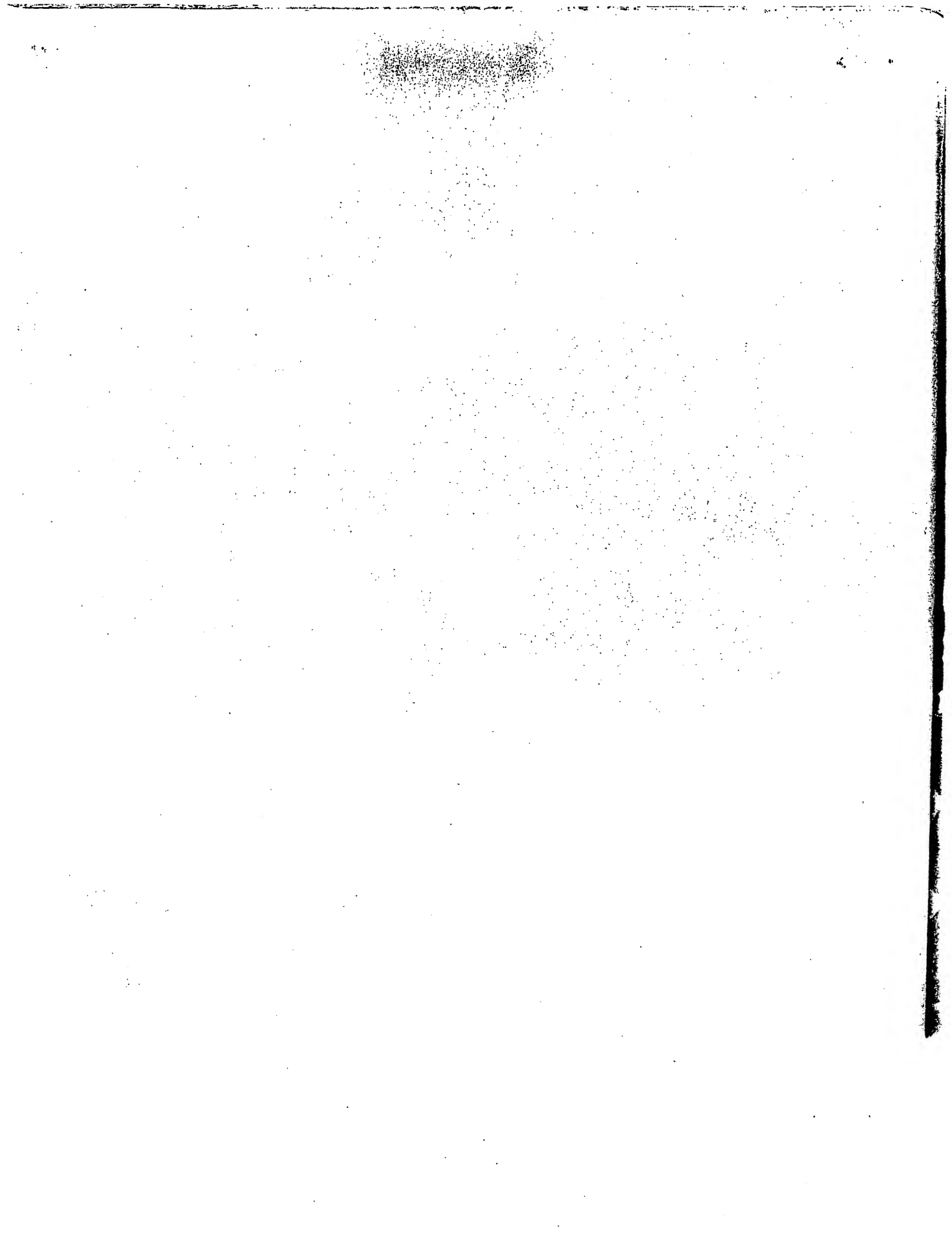
For example, if endnote references are to be displayed in superscript, and if the document contains a Superscript character format, the cross-reference format `<Superscript><$paranumonly>` displays the autonumber of the endnote paragraph as a superscript.

- 3 Create additional endnotes as you created the first one.

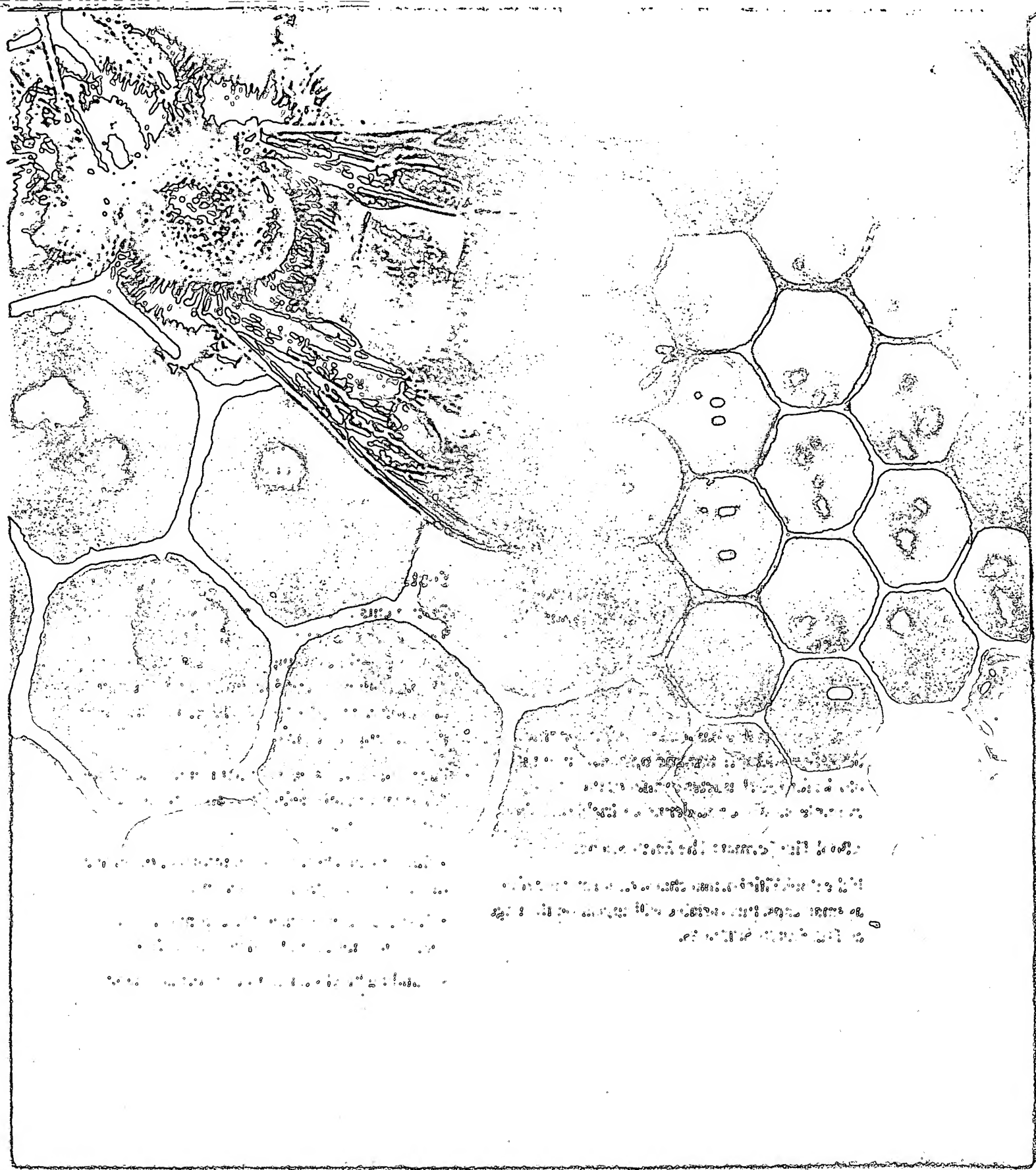
### To maintain endnotes:

Do the following:

- If you change the order of endnote references while editing the document, rearrange the endnotes to match the order of the references. Then update the cross-references to update the endnote reference numbers. For information on updating cross-references, see "Maintaining cross-references" on page 175.
- If you delete an endnote, delete all references to it. Otherwise, the reference will be an unresolved cross-reference.







# Chapter 7: Variables

**T**o use a short passage of text (for example, a word or phrase representing a product or company name) in several places in a document, or to include system information that is updated automatically (for example, the current date), use variables. Variables save you the trouble of typing or changing the text yourself.

## About variables

Variables are useful when you expect certain text to change often or when you know the same text will be used in several places. User variables, such as a product name, are defined by you. System variables, such as the current date, use information supplied by FrameMaker and your computer system.

### User variables

Each user variable has a name and a definition. A definition includes text and optional building blocks for the character format of the text. For example, suppose you define a variable as follows:

`<BookTitleFormat>`The Earth Sciences

If the `BookTitleFormat` character format is defined as small caps, this variable will appear on the page as `THE EARTH SCIENCES`.

You can change the definition of any user variable. For example, if you're using a variable to represent the title of a book, you can change the definition of the variable when the book's title changes. When you change the definition, all occurrences of the variable in your document are updated to use the new definition.

The standard templates don't provide any user variables. If you're using one of these templates, you have to create your own user variables. If you're using a template created at your site, it may already include some user variables.

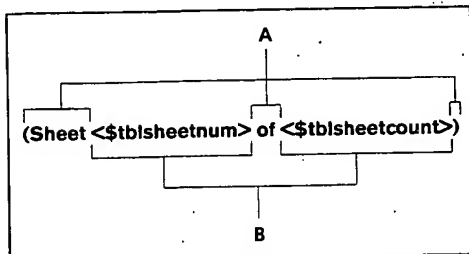
### System variables

Documents come with a set of system variables. The variables display information that the system generates—for example, the current page number, the page count of the document, or the current date. You can't add to the set, delete a variable from it, or rename a variable.

Each system variable has a name and a definition. A system variable definition can contain the following items:

- Building blocks for system information such as the month, day, year, and filename
- Text characters such as the comma and the spaces that appear in the date *May 1, 1997*
- Building blocks for character format changes

For example, the Table Sheet variable that appears in a table title as *(Sheet 3 of 5)* has the following definition.

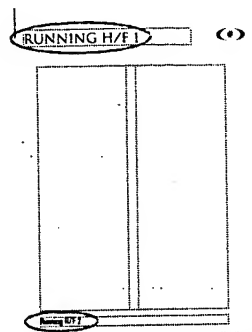


A. Text you type B. Building blocks

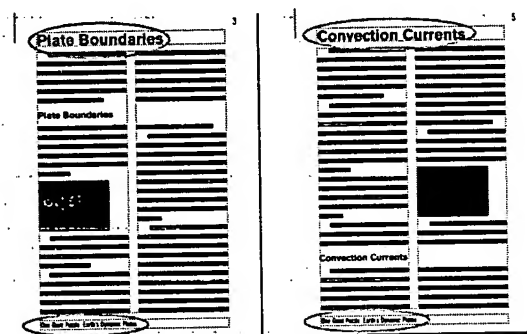
You can change the definition—the way the information is displayed—by adding, removing, or rearranging building blocks and by editing the text in the definition. For example, you can change the format used to display the current date. For a complete list of the system variables and their default definitions, see “Default values for system variables” on page 191.

Probably the most common way to use system variables is in background text frames such as headers and footers. (A background text frame is on a master page and doesn’t have a flow tag.) The contents of these text frames appear on the corresponding body pages. For example, you can use system variables to create running headers and

footers that contain chapter titles, section headings, or other information that may change from page to page.



System variable names appear on master pages.



FrameMaker provides values on body pages.

The values of system variables inserted on master pages are updated automatically. However, if you place a system variable on a body or reference page, the value is updated only when you open or print the file. You can also manually update the value of the variable when the file is open.



**DEFAULT VALUES FOR SYSTEM VARIABLES** Most system variables can be inserted on a body, reference, or master page. However, the Current Page # and Running H/F variables can be inserted only in a background text frame on a master page.

System variable	Default definition (US English version)	Example of display
Current Page #	<\$curpagenum>	3
Page Count	<\$lastpagenum>	18
Current Date (Long)	<\$monthname> <\$daynum>, <\$year>	October 11, 1997
Current Date (Short)	<\$monthnum>/<\$daynum>/<\$shortyear>	10/11/97
Modification Date (Long)	<\$monthname> <\$daynum>, <\$year>, <\$hour>:<\$minute00> <\$ampm>	September 24, 1997, 10:48 am
Modification Date (Short)	<\$monthnum>/<\$daynum>/<\$shortyear>	9/24/97
Creation Date (Long)	<\$monthname> <\$daynum>, <\$year>	July 1, 1997
Creation Date (Short)	<\$monthnum>/<\$daynum>/<\$shortyear>	7/1/97
Filename (Long)	<\$fullfilename>	(Windows) c:\Memos\Staffing.fm (Macintosh) Disk:Memos:Staffing.fm (UNIX) /usr/tom/Memos/Staffing.fm
Filename (Short)	<\$filename>	Staffing.fm
Running H/F 1	<\$paratext[Title]>	The Turbulent Oceans
Running H/F 2	<\$paratext[Heading1]>	Threat of Extinction
Running H/F 3	<\$marker1>	Plate tectonics
Running H/F 4	<\$marker2>	Volcanoes
Table Continuation	(Continued)	(Continued)
Table Sheet	(Sheet <\$tblsheetnum> of <\$tblsheetcount>)	(Sheet 1 of 2)
Volume Number	<\$volnum>	3
Chapter Number	<\$chapnum>	3

## Inserting variables

You can insert a variable on any type of page in a document—a body page, master page, or reference page. You can insert a variable in a text frame but not in a text line.

### To insert a variable:

- 1 Click where you want to insert the variable. If you're inserting the Current Page # variable or a running header/footer variable (see "About running header/footer variables" on page 197), you must click in a background text frame on a master page.
- 2 Choose Special > Variable.
- 3 Select a variable in the Variables scroll list.

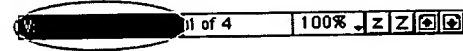
The scroll list contains the variables allowed at the insertion point in the document. For example, if the insertion point is in a text frame on a body page, the scroll list doesn't contain the Current Page # variable. The user variables appear in the scroll list after the system variables. The last system variable is Table Sheet.

- 4 Click Insert.

In most cases, the value of a variable inserted on a master page appears on both the master and the corresponding body pages. However, if you insert the Current Page # variable, a number sign (#) appears on the master page, and the actual page number appears on the body page. If you insert a running header/footer variable, the variable name appears on the master page, and the value appears on the body page.

### To insert a variable by using the keyboard:

- 1 Click where you want to insert the variable and press Control+0 (zero). The Tag area on the left side of the status bar prompts you for a variable name.



- 2 Start typing the variable name.

Type lowercase letters to search forward, uppercase to search backward. You can also use the Up Arrow and Down Arrow keys to scroll through variables. You need to type only enough letters to identify the variable uniquely. For example, if the only variable that begins with *B* is *BookTitle*, the phrase *BookTitle* appears in the Tag area when you type *B*.

- 3 Press Return to insert the variable in the document. If you decide to cancel the operation, Press Control+c or click in the document without pressing Return.

## Editing variables

When you insert a variable, its value is displayed at the insertion point. You can then move it, replace it with another variable, or delete it.

You can't edit occurrences of a variable directly in a document. To change the variable, you change its definition (see "Changing variable definitions" on page 195), or you convert it to editable text and then edit the text in the document. If you convert the variable to text, however, the text is no longer updated when the variable definition changes.

**To copy or move a variable:**

- 1 Click the variable to select it.
- 2 Copy or move the variable as you do editable text—by using the Edit > Copy, Edit > Cut, and Edit > Paste commands.

**To replace a variable:**

- 1 Double-click the variable to display the Variable dialog box.
- 2 Select a different variable in the Variables scroll list and click Replace.

**Deleting variables**

You can delete an occurrence of a user or system variable. You can also delete the definition of a user variable. Deleting a variable definition converts all occurrences of the variable in your document to editable text.

To delete a variable in a text inset, delete the variable in the source document.

**To delete one occurrence of a variable:**

Click the variable once to select it and press Delete. Backspacing the insertion point over a variable doesn't delete the variable.

**To delete a user variable definition:**

- 1 Choose Special > Variable.
- 2 Select the variable in the Variables scroll list and click Edit Definition.
- 3 Click Delete and then click Done.

**Converting variables to text**

After you convert a variable to text, you can edit the text. However, the text will no longer be treated as a variable.

**To convert a variable to text:**

- 1 If you want to convert a single occurrence of the variable, select it.
- 2 Choose Special > Variable and click Convert to Text.
- 3 Do one of the following:
  - To convert a single occurrence of a variable, click Selected Variable.
  - To convert all occurrences of a particular variable, select the variable in the Variables Named scroll list.
  - To convert all variables in the document, click All Variables.
- 4 Click Convert.

### Updating system variables on body or reference pages

When you change the definition of a variable, FrameMaker immediately updates the variable throughout the document, regardless of the type of page on which the variable appears. However, if the value (not the definition) of a variable changes, occurrences of the variable on body and reference pages will be updated automatically only when you open or print the file. Variables on master pages are updated when you save the document. If the value of a variable changes after you open or print the file, you can update the variable manually.

*Note: Although updated variables may print, they do not automatically appear on-screen unless you redraw the document by pressing Control+I (lowercase I).*

#### To update system variables manually:

- 1 Choose Special > Variable.
- 2 Click Update and then click OK.

### Importing variable definitions

When you want to use another document's variable definitions, copy those definitions to your document or to files in a book by using the File > Import > Formats command. For information, see "Importing and updating formats" on page 317 and "Changing the format of files in a book" on page 371.

### Creating user variables

Before you create a user variable, decide on the name of the variable, the text it will contain, and the character format of the text. For example, you might create a user variable for a product name that may change or for a long manual name that is difficult to type.

If you don't specify a character format in the variable definition, the variable uses the format at the insertion point. If you change the character format for the variable, the change applies only to the variable, not to the text that follows.

#### To create a user variable:

- 1 Click in a text frame and choose Special > Variable.
- 2 Click Create Variable.
- 3 Enter the name and definition of the variable. Variable names are case-sensitive; *Title* and *title* would be different variables. The complete definition, including typed text and character formats, can be up to 255 characters long. You cannot use system variable building blocks for user variables.

To include an angle bracket in a variable definition as text, precede it with a backslash (\).

*Note: In Windows and on UNIX systems, some special characters are entered or displayed differently in dialog boxes. In Windows, you enter a sequence of characters beginning with a backslash (\); these sequences are listed in Appendix A, "Typing in Dialog Boxes." On UNIX systems, the backslash sequences may appear in text boxes, even though you don't have to type the sequences to enter the characters.*

4 To change the character format within the variable definition, do the following:

- To use a character format stored in the Character Catalog, place the insertion point in the Definition text box where you want to change the character format and then click the character format in the Character Formats scroll list. The scroll list includes all the formats in the Character Catalog of the current document.

**Important:** Don't use a character format whose tag includes angle brackets.

- To change the character format back to the paragraph's default font before the end of the variable, place the insertion point in the Definition text box where you want to change the character format, and then click <Default ¶ Font> in the Character Formats scroll list.

5 Click Add. The variable appears in the User Variables scroll list.

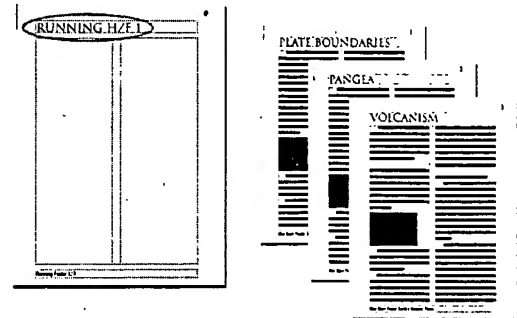
6 To add more user variables, repeat steps 3 through 5.

7 Click Done to return to the Variable dialog box and then click Done.

## Changing variable definitions

You can change a variable's definition at any time. For example, if you use a variable for a product's code name, you'll eventually need to change the definition to the final product name.

When you change the definition of a variable, the variable is immediately updated throughout the document, regardless of the type of page on which it appears. If the variable is in a header or footer on a master page, you may need to redisplay a body page to see the update.



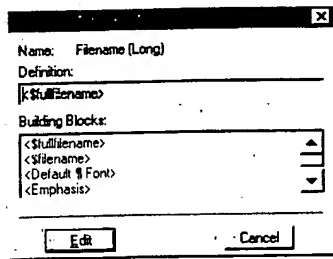
Variables are immediately updated throughout a document.

**Note:** If a variable is in a text inset that uses the source document's formats, you must change the variable definition in the source document. For information on text insets and their formatting options, see "Importing formatted text" on page 402.

### To change a variable definition:

1 Click in a text frame and choose Special > Variable. If you're changing the definition of the Current Page # variable or a running header/footer variable, you must click in a background text frame on a master page.

- 2 Select a variable in the Variables scroll list and click Edit Definition.



- 3 Do one of the following:

- For user variables, edit the name or definition and click Change.
- For system variables, edit the definition and click Edit. You can insert a building block for system-supplied information or for a character format at the insertion point by clicking the building block in the Building Blocks scroll list. Only the building blocks for information that is appropriate for the variable (for example, <\$fullfilename> and <\$filename> for the filename variables) appear in the scroll list. All the character formats in the Character Catalog appear at the bottom of the scroll list.

You can change the text and character format within the definition as described in “Creating user variables” on page 194.

- 4 If you’re editing a user variable, you can edit additional variables by selecting them in the scroll list, changing their definitions, and clicking Change.

- 5 Click Done to return to the Variable dialog box and then click Done.

## Changing definitions of date and time variables

FrameMaker includes both long and short versions of variables for the current date, the date the document was last modified, and the date the document was created (for example, *February 17, 1997 1:12 pm*). FrameMaker provides the following building blocks for date and time variables.

Building block	What it displays	Example
<\$second> <\$second00>	Seconds	8 or 32 08 or 32
<\$minute> <\$minute00>	Minutes	8 or 32 08 or 32
<\$hour> <\$hour01> <\$hour24>	Hours	8 or 12 08 or 12 08 or 22
<\$ampm> <\$AMPm>	Morning or evening designation	am or pm AM or PM
<\$daynum> <\$daynum01>	Number of the day	8 or 28 08 or 28
<\$dayname> <\$shortdayname>	Name of the day	Monday Mon
<\$monthnum> <\$monthnum01>	Number of the month	8 or 12 08 or 12
<\$monthname> <\$shortmonthname>	Name of the month	August Aug
<\$year> <\$shortyear>	Year	1997 97

FrameMaker uses the language of the current paragraph to determine the language used in date and time variables. For example, the current date variable may appear as *10 December 1997* in an English paragraph but as *10 Dezember 1997* in a German paragraph. If you change the language of a paragraph, the system variables in the paragraph are updated to use the new language.


If your system supports the typing of Japanese text in documents and dialog boxes, the following additional building blocks are available for Japanese dates.

Building block	Example
<\$daynumkanjikazu>	一 or 三十一
<\$daynumkanjnumeric>	一 or 三一
<\$monthnumkanjikazu>	一 or 十二
<\$monthnumkanjnumeric>	一 or 一二
<\$imperialyear>	1 or 10
<\$imperialyear01>	01 or 10
<\$imperialyearspeakkanjikazu>	元 or 十
<\$imperialyearspeakkanjnumeric>	元 or 一〇
<\$imperialyearkanjikazu>	一 or 十
<\$imperialyearkanjnumeric>	一 or 一〇
<\$imperialera>	平成

Japanese dates appear in a variable when the variable uses a Japanese font family and the Language property is set to Nihongo.

## Creating variables for running headers and footers

A running header/footer variable gives information about the contents of a page and can change from page to page. You might use running header/footer variables to include information such as the number and title of the current chapter, the name of the current first-level section, or the current page number.

 In addition to using running header/footer variables, you can also use the <\$chapnum> and <\$volnum> building blocks to add chapter and volume numbers to headers and footers. See “Including volume and chapter numbers in headers or footers” on page 370.

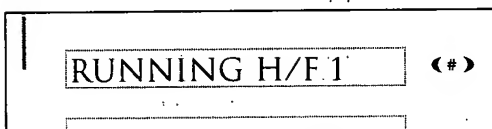
### About running header/footer variables

Running headers and footers use system variables such as the current page and current date variables. They also use four system variables provided especially for running headers and footers (Running H/F 1, Running H/F 2, Running H/F 3, and Running H/F 4).

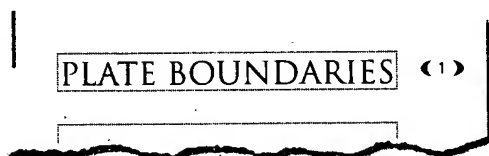
**RUNNING HEADERS AND FOOTERS BASED ON PARAGRAPH TAGS** The following table contains examples of running headers and footers that refer to paragraph tags.

Running header/footer variable definition	Explanation	Examples of display
<\$paratext[Head1]>	The text of the first paragraph that FrameMaker finds with the tag Head1	Types of plate boundaries
<Header><\$paratext[Head1]>	The text of the first paragraph with the tag Head1 (The text appears in the Header character format—uppercase, italic letters.)	<i>TYPES OF PLATE BOUNDARIES</i>
<\$paranum[SectTitle]>	The complete autonumber of the first paragraph with the tag SectTitle	Chapter 2
<\$paranumonly[SectTitle]>	The autonumber counters for the first paragraph with the tag SectTitle	2
<\$paratag[Chapter]>	The tag of the first paragraph with the tag Chapter	Chapter
<\$paratext[SectTitle, AppendixTitle]>	The text of the first paragraph with either the Sect-Title or AppendixTitle tag	PLATE TECTONICS

Running header/footer variables can refer to a paragraph with a particular tag—usually a title or heading paragraph—or to marker text. You can use these variables with their default definitions, or you can customize them—for example, by changing the tag that appears in the variable definition.



Variable name appears on master page.



Value appears on body page.

You insert a running header/footer variable in a background text frame on a master page in the same way that you insert variables elsewhere (see “Inserting variables” on page 192).

By default, the Running H/F 1 and Running H/F 2 variables use definitions that refer to paragraphs, and the Running H/F 3 and Running H/F 4 variables use definitions that refer to markers. You can change these default definitions either before or after you insert the variable. For instructions on changing a variable definition, see “Changing variable definitions” on page 195.



## Displaying paragraph text, tags, autonumbers

The most common use of running headers and footers is to show the text, autonumber, or tag of paragraphs with a specified tag. For example, a running header might show the current section heading or chapter number.

FrameMaker searches each body page to find a paragraph with the tag you specify and then puts the paragraph's text, autonumber, or tag in the running header or footer for that page. If a page doesn't contain a paragraph with the tag you specify, FrameMaker searches backward through the preceding pages and uses information from the first appropriate paragraph it finds.

The following building blocks in running header/footer variables refer to a paragraph tag.

Building block	What it displays
<\$paratext[paratag]>	The paragraph's text
<\$paranum[paratag]>	The paragraph's autonumber, including any text in the autonumber format
<\$paranumonly[paratag]>	The paragraph's autonumber counters, including any characters between them
<\$paratag[paratag]>	The paragraph's tag

Follow these guidelines for using paragraph tag building blocks:

- Don't use a paragraph tag that includes brackets.

- Replace *paratag* in the building block with the tag of the paragraph for which you want to display information. Don't delete the brackets. For some examples, see "About running header/footer variables" on page 197.

- You can include more than one paragraph tag in the [paratag] part of a building block. When you include multiple paragraph tags, FrameMaker uses the first paragraph it finds with one of the tags. Separate the tags with commas, as in the following example:

```
<$paratext[Head1, Head2]>
```

## Displaying text from a marker

If the text you want to show in a header or footer doesn't appear in a paragraph of its own, you can show text associated with a marker. For example, you can use a marker to show an abbreviated version of a title or to summarize the contents of a page. When text symbols are visible, marker symbols ( T ) indicate the location of markers.

*Plate boundaries*

### Types of plate boundary

Convergent boundaries:

These are zones where plates move together, causing one to go beneath the other, as happens when oceanic crust is involved; or where plates collide, which occurs when the leading edge is made of continental crust.

Page header contains abbreviated heading.

In this example, the marker in the heading contains the marker text *Plate boundaries*. A running header/footer variable then displays the marker text in the page header.

FrameMaker searches for a marker just as it does for a paragraph tag, searching the current page and then backward from the current page until it finds a marker of the specified type. You can use two marker types for running headers or footers: Header/Footer \$1 and Header/Footer \$2.

**To display text from a marker:**

- 1 Insert a Running Header/Footer variable in the header or footer on a master page (see “About running header/footer variables” on page 197). By default, the Running H/F 3 and Running H/F 4 variables use definitions that look for markers.
- 2 Edit the definition of the variable to use a `<$marker1>` or `<$marker2>` building block (see “Changing variable definitions” on page 195). The `<$marker1>` building block displays the text of a Header/Footer \$1 marker. The `<$marker2>` building block displays the text of a Header/Footer \$2 marker.
- 3 Display a body page and click where you want to insert a marker.
- 4 Choose **Special > Marker**.
- 5 In the Marker dialog box, choose either Header/Footer \$1 or Header/Footer \$2 from the Marker Type pop-up menu, enter the marker text, and click New Marker. When you enter the marker text, make sure that the spaces, punctuation, and capitalization are as you want them.

**Note:** You can't format marker text in the Marker Text box. To format the marker text, insert a character format building block before the marker building block in the system variable definition.

## Displaying a condition tag

In a document that uses conditional text, you can show a condition tag that appears on the current page in the running header or footer. (For information on conditional text, see Chapter 15, “Conditional Text.”) A predefined variable is not included for this purpose, but you can redefine any of the existing running header and footer variables to use the condition tag building block. Unlike the system variables that refer to a paragraph or a marker, variables with the condition tag building block search only on the current page.

**To display a condition tag:**

- 1 Insert a Running Header/Footer variable in the header or footer on a master page (see “Creating variables for running headers and footers” on page 197).
- 2 Edit the definition of the variable to use the `<$condtag [hitag, ..., lotag, nomatch]>` building block (see “Changing variable definitions” on page 195).

Replace *hitag*, *lotag*, and the ellipsis with one or more condition tags you want FrameMaker to find. Replace *nomatch* with the text you want to display if FrameMaker doesn't find one of the tags in the definition. If you don't want to display any text when there's no match, enter a nonbreaking space (a backslash followed by a space) in place of *nomatch*.

FrameMaker searches a page for the condition tags you specify. If it finds one of the tags, the tag appears in the running header or footer. If it finds more than one tag, the tag that appears first in the definition appears as the value of the variable.

### Displaying the security level

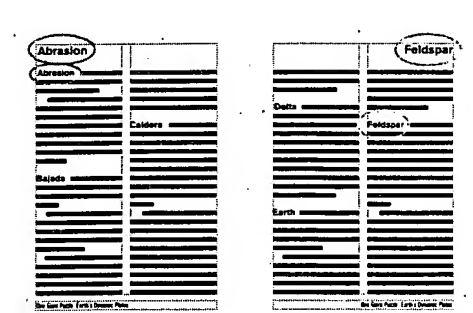
If your document contains classified information, you can use condition tags in running headers or footers to display the highest security level on a page.

#### To display the highest security level on a page:

- 1 Apply condition tags such as Top Secret and Secret to the classified information.
- 2 Set up headers or footers to include these tags on pages that contain classified information. For example, to display Top Secret on pages that contain both Top Secret and Secret information and Unclassified on pages that contain neither condition tag, define the building block as `<$condtag[Top Secret,Secret,Unclassified]>`.

### Creating dictionary-style headers or footers

You can use dictionary-style headers or footers to show the range of information that appears on one body page or on two facing body pages. Dictionary-style headers or footers appear frequently in documents such as dictionaries, indexes, and glossaries.



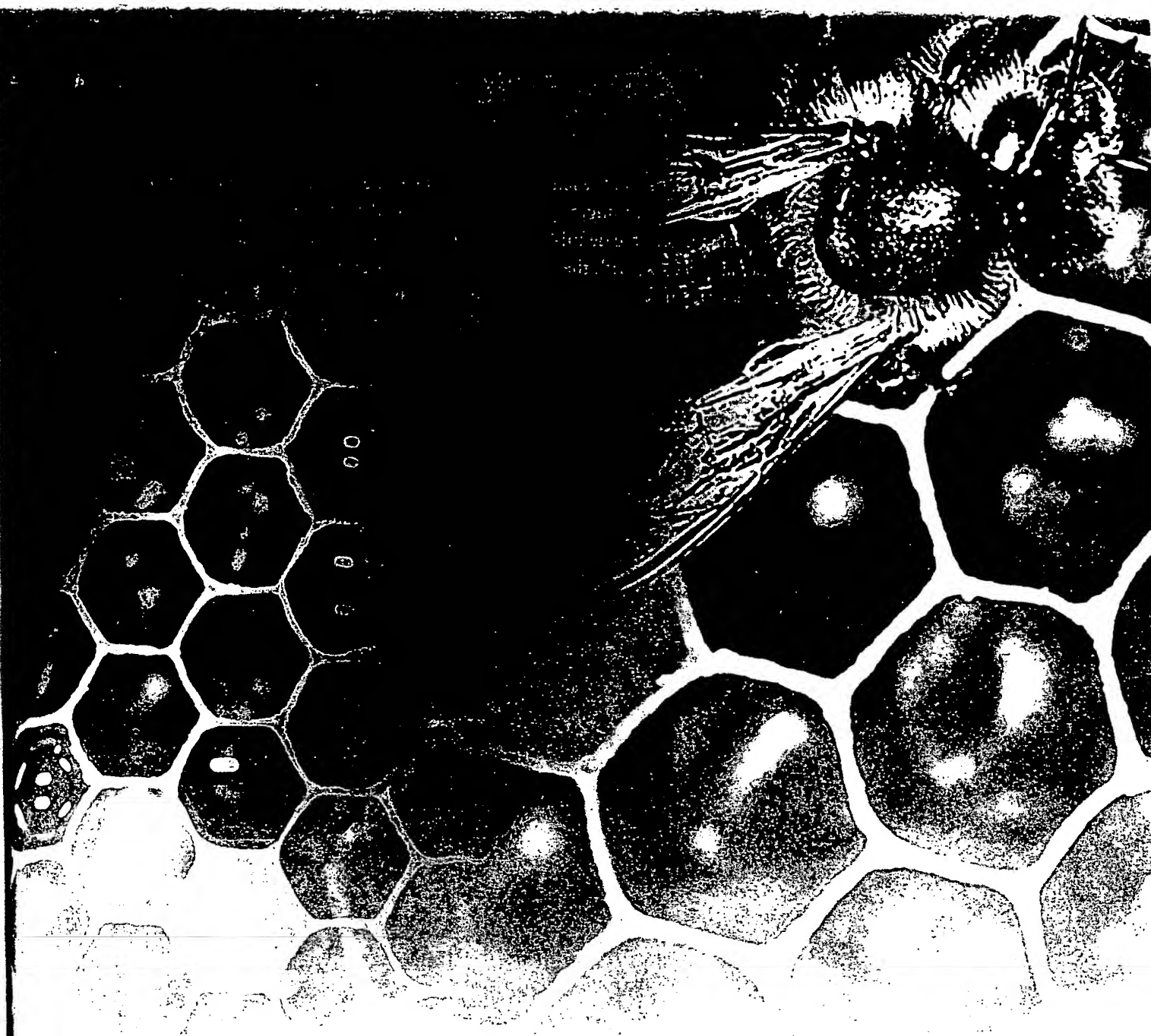
Headers show first entry on left and last on right.

#### To create a dictionary-style header or footer:

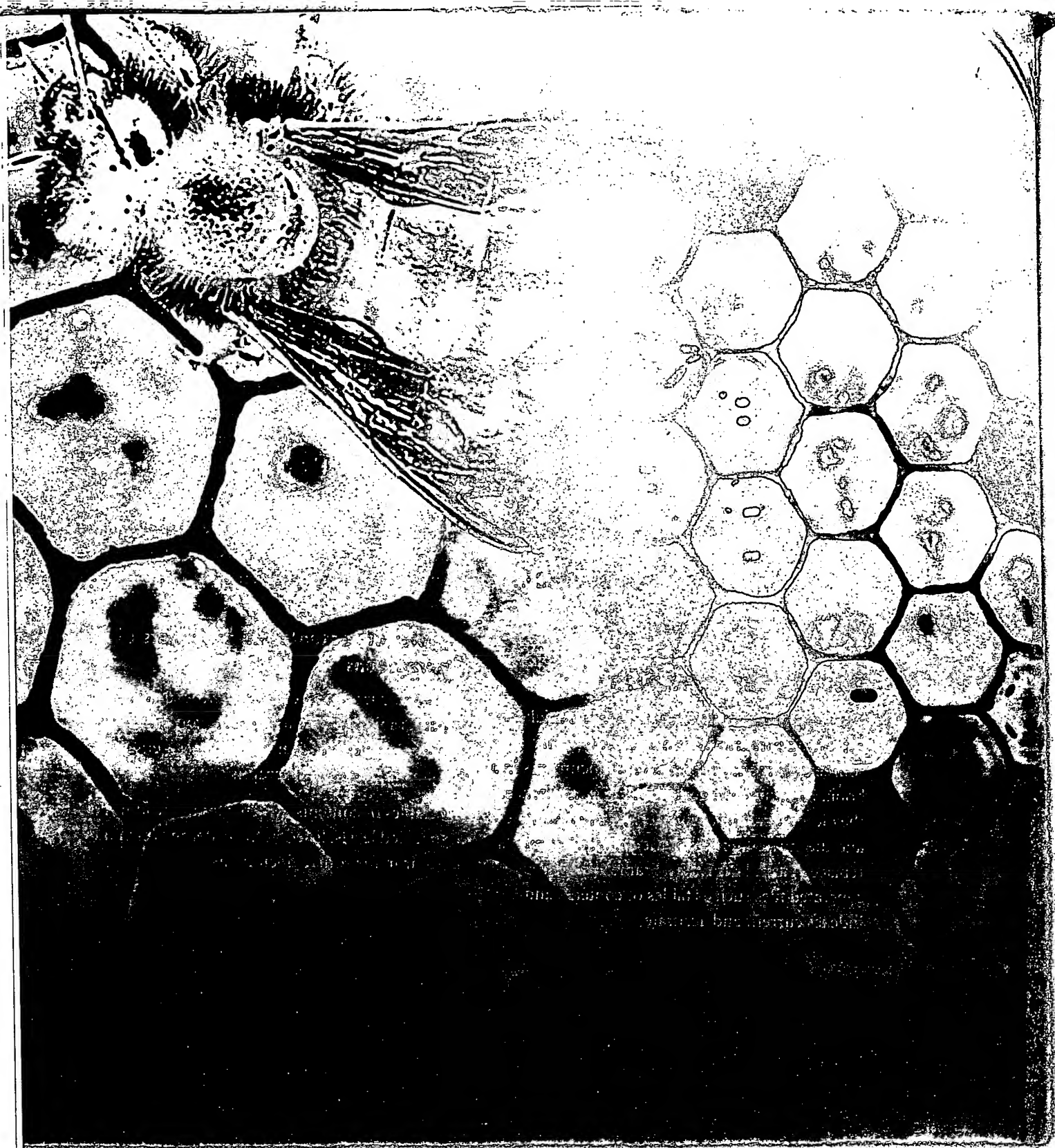
- 1 Insert a different running header/footer variable in the header or footer of each of two facing master pages ("Creating variables for running headers and footers" on page 197). For example, insert Running H/F 1 on the left master page and Running H/F 2 on the right master page.

2 Edit the definition of the variable on the left master page to use the `<$paratext[paratag>` building block (see “Changing variable definitions” on page 195). Replace *paratag* with the paragraph tag of dictionary terms.

3 In the same way, edit the definition of the variable on the right master page to use the `<$paratext[+,paratag>` building block. The plus sign (+) tells FrameMaker to find the last paragraph on the page matching the tag rather than the first paragraph.



13



# Chapter 13: Tables of Contents and Indexes

In FrameMaker, tables of contents (TOCs), lists of figures, and other such lists are generated from the text of specified paragraphs in a set of documents. An index is generated from markers you insert in documents. You can easily update both tables of contents and indexes whenever you revise the documents they're based on.

This chapter distinguishes broadly between the various types of lists, such as tables of contents, and indexes. It discusses creating and updating lists, creating and updating indexes, and titling and formatting both lists and indexes.

## About generated files

A *generated file* is a file created by FrameMaker by extracting paragraphs or marker text from a source document or from several documents in a book. Each time the generated file is updated, all the old paragraphs or marker text are discarded and the current text from the source documents replaces them. In this way, FrameMaker keeps generated files such as tables of contents and indexes current and accurate.

You can generate several types of lists and indexes in addition to a table of contents and standard index. For example, you can generate lists and indexes that contain text from paragraphs or from markers that you inserted in the text. The result may be a table of contents based on heading paragraphs, a list of illustrations based on figure titles, or an index based on special author markers.

Most lists and indexes fall into three categories: lists of paragraphs, lists of markers, and indexes of markers. A fourth category, lists and indexes of references, is used less often, for special purposes.

## Tables of contents and other lists of paragraphs

Lists of paragraphs contain the text of specified paragraphs (those with the tags you specify), with one entry per paragraph. You can generate the following lists of paragraphs:

- Tables of contents, which contain headings of specified levels, listed in the order in which they occur in the source documents

- Lists of figures, tables, or paragraphs, which contain figure captions, table titles, or the text of other specified paragraphs, listed in the order they occur in the source documents

TABLE OF CONTENTS	
Plate boundaries	124
Divergent boundaries	125
Convergent boundaries	126

LIST OF FIGURES	
Fig. 46 Divergent boundaries	125
Fig. 47 Convergent boundaries	126
Fig. 48 Transform boundaries	127

*Lists of paragraphs include TOCs and lists of figures.*

- Alphabetical lists of paragraphs, which contain the same information as the other lists but present them in alphabetical order

### Lists of markers

Lists of markers contain entries corresponding to the markers inserted on body pages in the source document. The markers are manually inserted on body pages in the source document, and the marker text appears in the generated list. For example, you could create a list of reviewers' comments on a draft by generating a list of markers of type Comment. In a standard list of

markers, entries appear in the order that they occur in the source document or book. You can also generate alphabetical lists of markers.

### List of Markers

20305: head1: Tectonics 65  
42407: head2: Pangea 65  
25668: head.step: rift valley 66  
35887: head1: Volcanism 68  
25807: head2: Volcanic arc 72  
39687: head2: Volcanic pipe 74

*A list of Cross-Ref markers*

### Indexes of markers

Indexes of markers include standard indexes, author and subject indexes, and indexes of other types of markers. The markers are manually inserted on body pages in the source document, and the marker text appears in the index. You can use syntax (building blocks) in the marker text to specify index levels and special page numbering, sorting, and formatting. Entries are sorted alphabetically, and entries with the same text are merged into a single entry with several page references.

### Index of Markers

10279  
head1  
Continental drift 74  
10557  
Step  
fossil evidence 66

*An index of Cross-Ref markers*



## Lists and indexes of references

Lists and indexes of references help you track special categories of information. You can generate lists and indexes of condition tags, external cross-references, unresolved cross-references, fonts, text insets, unresolved text insets, imported graphics, and Macintosh publishers.

### List of Fonts:

Trajan-Regular @ 18.0 pt 1	Helvetica Light @ 8.5 pt 1
Helvetica @ 6.5 pt 1	Helvetica Bold @ 10.0 pt 1

### Index of Fonts:

Trajan-Regular @ 10.0 pt 3-9	Helvetica Light @ 10.0 pt 5-7
Helvetica @ 10.0 pt 1-10	Helvetica Bold @ 10.0 pt 2-3

*A list of fonts and an index of fonts*

## Preparing the sources for TOCs and other generated lists

A table of contents or other generated list is based on the content of its source. The source can be either a single document or a group of documents in a book. In most cases, you must prepare the source documents to get the results you want.

### Preparing documents for a TOC or other list of paragraphs

When you generate a table of contents or other paragraph list, you choose the tags of the paragraphs you want to include. In the source document, do the following to avoid problems in the generated lists:

- Tag paragraphs consistently. For example, use Heading1 for all first-level headings; don't use it for any other paragraphs.
- Make each item you want to include in the list a single paragraph. For example, you won't get the desired results if a heading is two lines (with each line separated by a paragraph return).

*Note:* You usually generate a list of references—such as a list of fonts or unresolved cross-references—for your own use while working with a document. You do not need to prepare the document before generating such a list.

## Preparing documents for a list of markers

Before you generate a list of markers, the markers must be inserted in the source document.

In some cases, the markers may already have been inserted by FrameMaker into the document for another purpose (for example, Cross-Ref markers or Conditional Text markers). But in other cases, such as a list of reviewers' comments, you insert the markers yourself before generating the list.

*Note:* You can enter a tab character in marker text by typing either `\t` or the hexadecimal code `\x08`. However, if you generate a list of markers, only tabs entered as hexadecimal codes appear. If you generate an index of markers, only tabs entered as `\t` appear.

### To insert a marker in a source document:

- 1 Click where you want to insert the marker and choose **Special > Marker**.

- 2 Choose a marker type from the pop-up menu. You can use any predefined marker type except Conditional Text, Header/Footer \$1, Header/Footer \$2, or Cross-Ref. You can also define your own marker types (see "Adding custom marker types" on page 344).
- 3 Enter text that you want to appear as the list entry in the list. You can enter up to 255 characters (127 Japanese double-byte characters). You can type the text or use alternative methods to enter marker text without typing (see "To insert an index marker without typing" on page 333).
- 4 Click New Marker. A marker symbol, (T), appears when text symbols are visible.

## Generating TOCs and other lists

You can generate tables of contents and lists of paragraphs, markers, or references from a book or from a single document. For information on generating indexes, see "Generating indexes" on page 336.

### To generate a table of contents or list for a book:

- 1 Open the book window and select the file below where you want the generated file to appear.
- 2 Do one of the following:
  - Choose Add > Table of Contents.
  - Choose Add > List of, and then choose a type of list from the menu.

The items you see in the dialog box depend on the type of list you're generating.

- 3 In the Add File pop-up menu, specify whether the generated list will appear before or after the current document.

- 4 Enter a suffix or keep the default one. The suffix indicates the type of generated file. For example, TOC is the usual suffix for a table of contents.

*Note: The suffix is not the same as the filename's extension. The suffix is used with paragraph tags in the generated lists, and appears as part of the generated file's filename, such as UserGuideTOC.fm.*

- 5 Move paragraph tags, marker types, or reference types to the Include scroll list. To move an item between scroll lists, select the item and click an arrow, or double-click the item. To move all items from one scroll list to the other, Shift-click an arrow.


- 6 To have each entry in the generated list be linked to its source, select Create Hypertext Links. These links let you jump to the source of an entry by clicking on the entry (see "Testing and troubleshooting hypertext documents" on page 442).

- 7 Click Add, and then click Update. FrameMaker generates the list. You can view the generated list by double-clicking its name in the book window.

- 8 Save the generated list in the same folder as the source document or book. If you want to rename the generated file, use the book window to do so—FrameMaker will rename it on the disk and update all references.

The first time you generate a list (if you don't use a template as described on "Formatting lists and indexes using templates" on page 346), the list uses the page layout (master pages) of the first non-generated document in the book, and all entries look the same. For information on changing the format of a list—changes that won't be lost when you regenerate the list—see "Formatting lists and indexes" on page 345.

If the list already exists in the source document's folder when you save it, save it in the same folder and don't change the filename. That way, the list's formatting is used when you generate the list again. Otherwise, formatting changes won't be retained when you update the list.

 *To use a template or an existing generated file in a new book file, add it to the book as a generated file. Then put the existing file in the folder that contains the book file, using the name that appears in the book window.*

9 Save any open files in the book. Open files are updated only in your computer's memory and not on the disk. If a file isn't open, the changes are made on the disk.

**To generate a table of contents or list for a single document:**

- 1 Do one of the following:
  - Choose Special > Table of Contents.
  - Choose Special > List of, and then choose a type of list from the menu.
- 2 When prompted, specify whether you want to create the generated file as a standalone document or add it to a book.

If you choose Yes to create a standalone document, FrameMaker will create a generated list in the original document's folder. If you choose No, FrameMaker adds the index to an open book, or creates a new book if necessary.

- 3 Enter a suffix or keep the default one. The suffix indicates the type of generated file. For example, TOC is the usual suffix for a table of contents.

*Note: The suffix is not the same as the filename's extension. The suffix is used with paragraph tags in the generated lists, and appears as part of the generated file's filename, such as Chapter1TOC.fm.*

- 4 Move paragraph tags, marker types, or reference types to the Include scroll list. To move an item between scroll lists, select the item and click an arrow, or double-click the item. To move all items from one scroll list to the other, Shift-click an arrow.

- 5 To have each entry in the generated list be linked to its source, select Create Hypertext Links. These links let you jump to the source of an entry by clicking on the entry (see "Testing and troubleshooting hypertext documents" on page 442).

- 6 Do one of the following:

- If you are creating a standalone list, click Set. FrameMaker generates and displays the list.
- If you are adding the list to a book, click Add and then click Update. If a new book is created, choose File > Save Book As, and then save the book.

- 7 Save the generated list in the same folder as the source document or book.

The first time you generate a list (if you don't use a template as described on "Formatting lists and indexes using templates" on page 346), the list uses the page layout (master pages) of the source document or of the first non-generated document in the book, and all entries look the same. For information on changing the format of a list—changes that won't be lost when you regenerate the list—see "Formatting lists and indexes" on page 345.

8 Save the list in the same folder as the source document or book. For information on renaming generated files, see "Renaming files in books" on page 365.

## Updating and editing TOCs and lists

A generated list (such as a table of contents) can quickly become outdated. You can update a table of contents to include revised headings and up-to-date page numbers, or change which paragraphs are included.

You edit entries in a list by editing their corresponding paragraphs or markers in the *source* document and then regenerating the list. If you revise entries by typing directly in the list, your changes will disappear the next time you generate it.

For example, if you fix a typing error directly in a table of contents, that error will reemerge the next time you generate because it still exists in the source paragraph. To permanently fix an error, you must correct it by changing the paragraph or marker text in the source document and then regenerating the list or index.

This section describes updating and editing generated lists of paragraphs, not lists of markers. For information on updating and editing indexes or lists of markers, see "Updating and editing indexes" on page 339.

### To update a TOC or list that is part of a book:

- 1 Make changes to the source documents as needed.
- 2 In the book window, choose Edit > Update Book.
- 3 Move the lists you want to update to the Generate scroll list, make sure Generate Table of Contents, Lists, and Indexes is selected, and then click Update.

### To add or remove paragraph tags included in a TOC or list that is part of a book:

- 1 Select the generated file (such as the table of contents) in the book window.
- 2 Choose Edit > Set Up Table of Contents or Set Up List of *type*.
- 3 Move items between the list boxes as desired, and click Set. Then click Update.

### To update a TOC or list that is a standalone document:

- 1 Make changes to the source document as needed.
- 2 In the source document, choose the command (such as Table of Contents) from the Special menu, and then choose Yes when prompted to create a standalone document.
- 3 Move items between the list boxes as desired, and click Set.

## Finding the source of list entries

When you need to revise an entry, you must trace the entry back to its source—the corresponding paragraph in the source document—to revise the entry.

The quickest way to find the source of a list entry is to use the hypertext link on the entry in the generated file. This hypertext link can display and select the corresponding information in the source document. You can also find and select an entry in the source document by using the Find/Change command.

### To find the source of a list entry by using a link:

1 If you did not select Create Hypertext Links when you generated the list or index, select it now and regenerate the list.

2 In the generated list, do one of the following:

- (Windows) Alt-Control-click an entry in a list.
- (Macintosh) Control-Option-click an entry in a list.
- (UNIX) Control-right-click an entry in a list.

FrameMaker opens the source document to the page that contains the corresponding paragraph and selects it.

### To find and select a paragraph by using Find/Change:

1 In the source document (not in the generated list), choose Edit > Find/Change.

- Choose Paragraph Tag from the Find pop-up menu and enter the tag you want.

2 Click Find.

## Editing and deleting entries

You revise the contents of entries by changing their corresponding paragraphs in the source document.

### To edit a list entry:

In the source document, edit the paragraph text.

### To delete a list entry:

In the source document, delete the paragraph text.

## Troubleshooting TOCs and lists

Minor problems in the source document may cause corresponding problems in the list. For example, an incorrectly tagged paragraph may cause an extra entry to appear in the list or to be missing from it. Or an empty paragraph may cause an extra line to appear in the list.

<b>Continental drift</b> .....	10	
Fit of the Continents .....	13	
.....	13	A
Many rocks are broken by the effect of freezing and thawing .....	34	B

A. An extra line appears here. B. This entry doesn't belong in the list.

**Extra entries or lines** Incorrect formatting in the source document can cause extra paragraphs to appear in a list such as a table of contents. To correct this, do the following:

- If the list contains an entry that doesn't belong there, check the corresponding paragraph tag or marker type in the source document and either apply a different format to the paragraph or change the marker type.
- If the list contains an extra line with only a page number, delete the corresponding empty paragraph in the source document. If you need extra space between paragraphs in the source document, use the spacing properties of the paragraphs' formats rather than insert an empty paragraph.

**Missing entries** To include entries that appear in the source document, but not in the list, do one of the following:

- If all entries with a particular paragraph tag or marker type are missing, make sure the Include scroll list in the Set Up dialog box contains the correct items.
- If an occasional entry is missing, check the tag of the corresponding paragraph or the type of the corresponding marker in the source document. If the paragraph tag or marker type is incorrect, the information won't be included in the list.

**Split entries** A multiline heading in the source document can be a problem if the line breaks were created by pressing Return so that each line is a separate paragraph. The list will contain an entry for each paragraph in the heading. Fixing the list requires using only one paragraph for the heading in the source document.

The heading should not contain forced returns. Instead, to force a heading to break into two lines where you want, change the right indent of the heading paragraph in the source document. If the heading is centered, you may want to change both the left and right indents. You can also use nonbreaking spaces to force a heading to break acceptably.

**Bad line breaks** Bad line breaks in the list or its source document may separate information that belongs together in the list. To correct this, do one of the following:

- Change the characters after which FrameMaker allows line breaks. For example, FrameMaker normally allows a line break after an en dash (–). To disallow breaks after an en dash, use Format > Document > Text Options. See “Changing hyphenation and line breaks” on page 105.
- In the special text flow on the reference page, use nonbreaking spaces between the text and page number for each entry so that a page number does not appear on a line by itself. See “Editing special text flows for lists and indexes” on page 347 and “Changing hyphenation and line breaks” on page 105.

**Disappearing titles** A title you entered may disappear the next time you generate the list unless you follow the steps in “Adding titles and other static text to lists and indexes” on page 345.

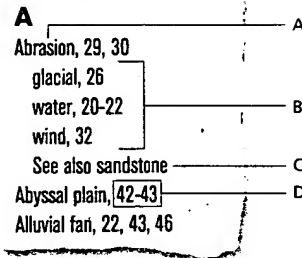
**Disappearing formatting** If your formatting changes (see “Formatting lists and indexes” on page 345) aren’t retained when you regenerate, do the following:

- If you changed the filename or location of the list, change the name and location back. FrameMaker won’t find any formatting changes unless you save the list in the same folder as the source document and use the filename that FrameMaker assigns.
- To retain paragraph and character format changes, store them in the list’s Paragraph Catalog or Character Catalog, making them available the next time you generate the list. For details, see “Redefining (updating) formats” on page 121.
- To retain other changes, make them in the special text flow, as described in “Editing special text flows for lists and indexes” on page 347.

## About indexes

In a typical index, entries are generated from markers and are sorted alphabetically. Entries with the same text are merged into a single entry with several page references. You can add special building blocks to marker text to control the form of the index entry—for example, to specify that it’s a subentry or a cross-reference to another entry.

### Ind x



A. Main entry B. Subentries C. Cross-reference to another entry D. Page range

Most of the time, you’ll use the Index marker type to create the standard index you find in the back of most books.

You can also create specialized indexes by using predefined marker types such as Subject or Author, or by using other marker types that you create (see “Adding custom marker types” on page 344).

### Subject Index

**A**

Abrasion, 76, 158	Bonding, 31-34	Cap rock, 50-51
glacial, 45	covalent, 33-34	Cavern, 56

### Author Index

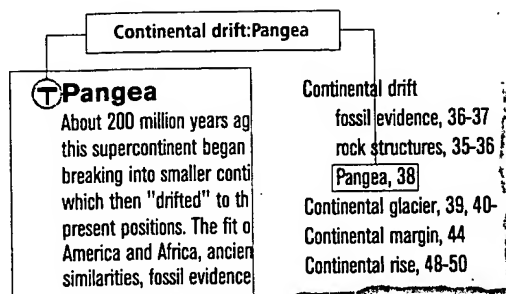
**A**

Adams, Jane 12	Halsey, Rich 27	Lough, Eric 45
Adler, Mortimer 20	Holbrook, Aaron 31	Lyell, Allen 19

*Specialized indexes generated from different marker types*

## Adding index markers

Before generating an index for a document, you insert the markers for the index entries.



*Index marker placed in the source document and the formatted entry appearing in the index*

### To insert an index marker:

- 1 Click where you want to insert the marker and choose **Special > Marker**. You can insert markers only in text frames.
- 2 Choose a marker type from the pop-up menu. Typically, you'll use the Index marker type. To create several indexes for a document—for example, a subject index and an author index—use a different marker type for each.
- 3 Enter the text of the index entry in the Marker dialog box. You can enter up to 255 characters (127 Japanese double-byte characters). You can also use any of the following building blocks in marker text to control the form of the index entry and its location in the index.

Building block	Meaning
: (colon)	Separates levels in an entry
; (semicolon)	Separates entries in a marker
[ ] (brackets)	Specifies a special sort order for the entry
<\$startrange>	Indicates the beginning of a page range
<\$endrange>	Indicates the end of a page range
<\$nopage>	Suppresses the page number in the entry
<\$singlepage>	In a marker that contains several entries, restores the page number for an entry that follows a <\$nopage> building block
Character tag between angle brackets (< and >)	Changes the character format (for example, <Emphasis>)
<Default Para Font>	Restores the paragraph's default font

If you're working in Japanese fonts, enter all these building blocks except the brackets ([ and ]) using single-byte characters.

**Note:** To enter a backslash or any of the special characters used in these building blocks—colon, semicolon, bracket, or angle bracket—as regular characters, precede them with a backslash (\).

- 4 Click **New Marker**. A marker symbol (T) appears when text symbols are visible.



**To insert an index mark after typing:**

To reduce or eliminate typing when creating index markers, do one of the following:

- Insert an empty marker (a marker with no text in it) at the beginning of the word you want to index. When you generate the index, the text to the right of the marker, up to the first space, becomes the text of an entry.
- To use text that appears in the document as the marker text, simply select the text in the document. As long as the selected word or phrase doesn't contain a marker, it automatically appears in the Marker Text box.

**To put several entries in one marker:**

Type several entries in the marker, using a semicolon (;) between entries, as in the following examples.

Marker text	Result in index
Abrasion; Water erosion	Abrasion 10 Water erosion 10
<\$npage>Erosion. See Abrasion;<\$singlepage>Abrasion	Abrasion 10 Erosion. See Abrasion

In the second example, <\$npage> affects subsequent entries in the marker. To return to a single page number, <\$singlepage> is included with the next entry in the marker.

You can type any number of spaces after the semicolon to improve readability. Initial spaces are ignored when compiling the index unless they're special ones such as nonbreaking or em spaces. (If you're working in Japanese fonts, only single-byte space characters are ignored.)

**Using subentries in index entries**

You can group several entries under one entry for a larger category of information by marking them as subentries. You can also create subentries to subentries.

```
Continental drift
  fossil evidence, 36-37
  rock structures, 35-36
  Pangea, 38
Continental glacier, 39, 40-41
Continental margin, 42, 44
Continental rise, 45-46
```

**Subentries****To create a subentry:**

Separate the entry from the subentry with a colon (:). For example, to create the first subentry in the illustration, enter **Continental drift:fossil evidence**

A subentry is always preceded by the entry to which it is subordinate. If you need two subentry levels, place a colon between the subentry and the sub-subentry. For example, enter **Continental drift:fossil evidence:dating of**

### Using cross-references in index entries

Indexes often contain cross-reference entries to direct readers to related terms. This makes it unnecessary to duplicate the entries and page numbers for related terms that already appear in the index.

Abrasion, 29, 30  
glacial, 26  
wave, 31-32  
wind, 32  
**See also Sandstone**  
Abyssal plain, 42-43  
**See also Bajada**

#### Cross-references

Cross-references can also appear as subentries (usually preceded with *See also*, as in the illustration). For information on sorting cross-reference subentries so that they appear at the top or bottom of the list of subentries for the same main entry, see "Specifying sort orders in indexes" on page 336.

#### To create a cross-reference in an index entry:

Insert a marker and use `<$nopage>` at the beginning of the marker text to prevent a page number from appearing with this entry. For example, to create the first cross-reference in the illustration, enter `<$nopage>Abrasion. See also Sandstone`

### Using page ranges in index entries

You can use a page range such as 36-37 to mark information that spans several pages.

Continental drift  
convergent boundary, 17  
divergent boundary, 21  
fossil evidence, 36-37  
rock structures, 35-36  
Pangea, 38

#### Page ranges

You can create a page range in an entry by manually inserting two markers to indicate the range, one at the beginning of the range and the other at the end. You can also have FrameMaker create page ranges for you automatically whenever the same marker text occurs on consecutive pages of a document. For example, instead of 3, 4, 5, the entry would automatically appear as a page range (3-5).

#### To manually create a page range for an index entry:

- 1 Insert an index marker at the beginning of the information, with `<$startrange>` at the beginning of the marker text. For example, to create the first page number in a range, enter `<$startrange>Continental drift:fossil evidence`
- 2 Add an index marker at the end of the information, identical to the first except that you enter `<$endrange>` rather than `<$startrange>` at the beginning of the marker text. For example, to create the second page number in a range, enter `<$endrange>Continental drift:fossil evidence`

If both markers appear on the same page, the page range collapses to a single page number.

#### To automatically create page ranges in an index:

- 1 Display the reference page that contains the special text flow for indexes, as described in “Editing special text flows for lists and indexes” on page 347.

- 2 Type the <\$autorange> building block at the beginning of the paragraph whose tag begins with the marker type.

For example, to collapse the entries generated from markers of type Index into page ranges when possible, edit the paragraph tagged IndexIX to contain the following building blocks:

<\$autorange><\$pagenum>

#### Using character formats in index entries

You can change the character format of specified text or of the page number in an entry. For example, you may want a book title to appear in italics or you may want a particular page number to appear in bold. The character format must be stored in the Character Catalog of the index.

Sedimentary rock, 21-21, 67-68  
chemical, 46-47  
lithification, 58  
Seiche, 39, 50-51  
Self dune, 55, **58**  
Seismic sea wave,  
(See) Tsunami

Character formatting

For information on specifying paragraph formats for entries in an index, see “Changing paragraph and character formats of entries” on page 348.

#### To use a character format in an index entry:


- 1 Enter an index entry, as described in “Adding index markers” on page 332.

- 2 To format part of the entry in a character format, do one of the following:

- To format specific text in an entry, type the character tag between angle brackets (< and >) before the text and type <Default Para Font> after it. For example, to create the entry “Tidal Waves See Tsunami,” you might enter this marker text:  
**Tidal Waves <Emphasis>See<Default Para Font> Tsunami**

Character format tags affect only the entry they precede. For example, <bold>fruit:strawberry would generate a two-line entry that shows “fruit” as bold and “strawberry” without bold. To format both entries in bold, enter  
**<bold>fruit:<bold>strawberry.**

- To format only the page number, type the character tag between angle brackets at the end of the marker text. For example, to create the entry “Erosion 24,” you might enter this marker text:  
**Erosion<Bold>**

 If you're using a special character format for many—but not all—page numbers in an index (for example, to use bold for principal entries), you may want to create a custom marker type with that formatting. See “Adding custom marker types” on page 344.

## Specifying sort orders in indexes

You can change where an entry appears in the index by specifying a sort order. For example, even though 486 would normally appear with other numbers in the index, you may want it to appear under *F* (as if it were spelled out as *four eighty-six*).

Similarly, if you're using a *See also* cross-reference in a subentry, you can ensure that it is the last one under the main entry.

If you're working in Japanese, kanji characters always need a special sort order defined. (For information on Japanese sort order, see "About Japanese sort order" on page 355)

### To specify a sort order for an index entry:

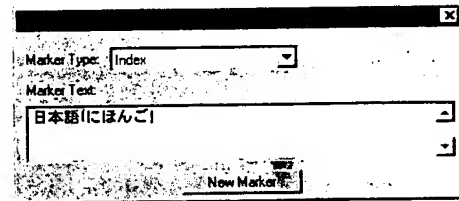
Add text between brackets ( [ and ] ) at the end of the marker text, indicating exactly how you want the entry sorted.

Index marker text	Result in index	Explanation
1950s[Nineteen fifties]	Neap tides 47 1950s 10 North America 21	Sorts under <i>N</i> (for <i>Nineteen fifties</i> )
Erosion:of soil [Erosion:soil]	Erosion rate 32 of soil 10	Ignores the word of
<\$nopage>Erosion: see also Wind [Erosion:aaa]	Erosion see also Wind rate 16	Sorts as the first entry under <i>Erosion</i>
<\$nopage>Erosion: see also Wind [Erosion:zzz]	Erosion rate 16 see also Wind	Sorts as the last entry under <i>Erosion</i>

**Note:** The sorting information, in brackets, must be the last item in the marker text.

### To specify the sort order for a kanji index entry:

Enter its pronunciation (yomi-kana) in brackets in the marker text. (Double-byte bracket characters may be used.)



## Generating indexes

After you insert index markers in your source document, you can generate a standard index or any other index of markers. When you revise your source document, you can generate the index again to update it. For information on generating tables of contents and other lists, see "Generating TOCs and other lists" on page 326.

You ordinarily use predefined marker types. However, you can create your own marker types for special effects in indexes, such as displaying principal entries in bold or adding custom text to some page entries but not to others. The custom text might be the word *note* to follow some page numbers and *figure* to follow others. Scholarly indexes might use abbreviations such as *ff* and *passim* after page numbers.

You can also generate a special-use index of references such as an index of fonts used in a document. This type of index is not generated from markers.

### Standard Index

#### A

Abrasion, 15, 17  
glacial, 14  
river, 10-12  
wave, 17-18

Standard index

### Index of References

Trajan-Regular @ 18.0 pt 1-10  
Helvetica Light @ 8.5 pt 1, 9  
Helvetica @ 6.5 pt 1  
Helvetica Bold @ 10.0 pt 1, 2  
Trajan-Regular @ 18.0 pt 2-10

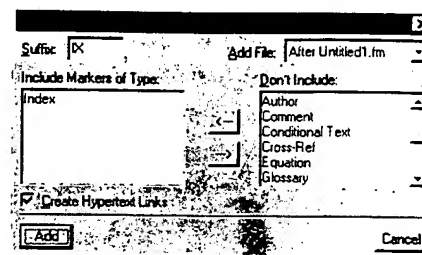
Index of references (fonts)

You can generate an index from a single document or from a book.

#### To generate an index for a book:

- 1 Open the book window and select the file above where you want the generated file to appear.
- 2 Do one of the following:
  - Choose Add > Standard Index.
  - Choose Add > Index of, and then choose the type of specialized index you want to create.

- 3 Move the marker types you used for the entries to the Include Markers of Type scroll list.



To move an item between scroll lists, select the item and click an arrow, or double-click the item. To move all items from one scroll list to the other, Shift-click an arrow.

- 4 In the Add File pop-up menu, specify whether the generated list will appear before or after the current document.
- 5 Enter a suffix or keep the default one. The suffix indicates the type of generated file. For example, IX is the usual suffix for a standard index..

**Note:** The suffix is not the same as the filename's extension. The suffix is used with paragraph tags in the generated lists, and appears as part of the generated file's filename, such as UserGuideIX.fm.

- 6 To link each entry in the generated index to its source, select Create Hypertext Links.
- 7 Click Add, and then click Update. FrameMaker generates the index and displays it in a separate document.
- 8 Save the index in the same folder as the source document or book. If you want to rename the generated file; use the book window to do so—FrameMaker will rename it on the disk and update all references.

The first time you generate an index, it uses the page layout of the first non-generated document in the book, and all entries look the same. (You can avoid this unformatted look by using a template; see “Formatting lists and indexes using templates” on page 346.) For information on making changes to the format of an index—changes that won’t be lost when you regenerate it—see “Formatting lists and indexes” on page 345.

9 Save any open files in the book. Open files are updated only in your computer’s memory and not on the disk. If a file isn’t open, the changes are made on the disk.

**To generate an index for a single document:**

1 Do one of the following:

- Choose Special > Standard Index.
- Choose Special > Index of, and then choose the type of specialized index you want to create.

2 When prompted, specify whether you want to create the generated file as a standalone document or add it to a book.

If you choose Yes to create a standalone document, FrameMaker will create a generated index in the original document’s folder. If you choose No, FrameMaker adds the index to an open book, or creates a new book if necessary.

3 Enter a suffix or keep the default one. The suffix indicates the type of generated file. For example, IX is the usual suffix for a standard index.

**Note:** The suffix is not the same as the filename’s extension. The suffix is used with paragraph tags in the generated lists, and appears as part of the generated file’s filename, such as *UserGuideIX.fm*.

4 To link each entry in the generated index to its source, select Create Hypertext Links.

5 Do one of the following:

- If you are creating a standalone index, click Set. FrameMaker generates and displays the index.
- If you are adding the index to a book, click Add and then click Update. If a new book is created, choose File > Save Book As, and then save the book.

The first time you generate an index, it uses the page layout of the source document or of the first non-generated document in the book, and all entries look the same. (You can avoid this unformatted look by using a template; see “Formatting lists and indexes using templates” on page 346.) For information on making changes to the format of an index—changes that won’t be lost when you regenerate it—see “Formatting lists and indexes” on page 345.

6 Save the index in the same folder as the source document or book. For information on renaming generated files, see “Renaming files in books” on page 365.

**To generate a standard index that displays page numbers in a variety of ways:**

1 Create one or more custom marker types (see “Adding custom marker types” on page 344) and name them in a way that indicates their intended use. For example, if you want to distinguish index entries that refer to footnotes, you might create a marker type called IndexNote.

2 Index your source document, using the Index marker type for regular entries and your custom marker types for the others.

3 Follow the steps in “Generating indexes” on page 336 to generate an index. Select the Index marker type along with the custom ones.

In the index, edit the special text flow on the reference page for the custom marker (the reference page would be called IX) to add text after the page number or to change character format. For example, you might change the text for Index-NoteIX as follows to have *[note]* appear after the page number: `<$pagenum> [note]`

For details, see “Manually adding text to entries” on page 351, and for adding a character format, see “Changing paragraph and character formats of entries” on page 348.

4 Update the index again for your edits to take effect.

## Updating and editing indexes

An index can quickly become outdated. With an index, you typically need to make some changes after you review the index for the first time. For example, you may see that some entries do not use parallel phrasing, or you may decide to change the organization of some entries.

You edit entries in an index by editing their corresponding paragraphs or markers in the *source* document and then regenerating the index. If you revise entries by typing directly in the index, your changes will disappear the next time you generate it.

For example, if you fix a typing error directly in an index, that error will reemerge the next time you generate because it still exists in the source marker. To permanently fix an error, you must correct it by changing the marker text in the source document and then regenerating the index.

This section describes updating and editing generated indexes (or lists of markers), not lists of paragraphs such as tables of contents. For information on updating and editing lists of paragraphs, see “Updating and editing TOCs and lists” on page 328.

### To update an index that is part of a book:

- 1 Make changes to the source document as needed.
- 2 In the book window, choose Edit > Update Book.
- 3 Move the lists you want to update to the Generate scroll list, make sure Generate Table of Contents, Lists, and Indexes is selected, and then click Update.

### To add or remove items included in an index that is part of a book:

- 1 Select the generated index in the book window.
- 2 Choose Edit > Set Up Standard Index (or Set Up Index of *type*).
- 3 Move items between the list boxes as desired and click Set. Then click Update.

### To update an index that is a standalone document:

- 1 Make changes to the source document as needed.

2 In the source document, choose the command (such as Standard Index) from the Special menu, and then choose Yes when prompted to create a standalone document.

3 Move items between the list boxes as desired, and click Set.

### Finding the source of index entries

When you need to revise an entry, you must trace the entry back to its source—the corresponding marker in the source document—to revise the entry.

The quickest way to find the source of an index entry is to use the hypertext link on the entry in the generated file. This hypertext link can display and select the corresponding information in the source document. You can also find and select a marker in the source document by using the Find/Change command.

**Important:** If you're generating extremely large indexes (indexes of more than 50,000 markers), don't use *Create Hypertext Links*. Generating indexes of this size with *Create Hypertext Links* selected will take a very long time or might not succeed.

#### To find the source of an index entry by using a link:

- 1 If you did not select *Create Hypertext Links* when you generated the index, select this option and regenerate.
- 2 Choose Special > Marker.
- 3 In the generated index, do one of the following:
  - (Windows) Alt-Control-click a page reference in an index.

- (Macintosh) Control-Option-click a page reference in an index.

- (UNIX) Control-right-click a page reference in an index.

FrameMaker opens the source document to the page that contains the corresponding marker and selects it. The marker text appears in the Marker dialog box.

#### To select a marker by using Find/Change:

1 In the source document (not in the generated list), choose Edit > Find/Change.

- Choose Any Marker, Marker of Type, or Marker Text from the Find pop-up menu. Enter the marker type or marker text as needed.

2 Click Find.

**Note:** When a marker is selected, the marker text appears in the Marker dialog box. Don't click *Change* in the Find/Change dialog box to change the marker text. If you do, FrameMaker replaces the marker itself. Instead, change the text in the Marker dialog box and then click *Edit Marker*.

#### To select a marker in the source document:

Drag through it. As long as the selected text contains only one marker, its text appears in the Marker dialog box. If more than one marker is selected, the text of the first marker appears.

### Editing and deleting index entries

You revise the contents of entries by changing their corresponding markers in the source document.



**To edit a marker:**

Select the marker, change the text in the Marker dialog box, and click Edit Marker.

**To delete a marker:**

Select the marker in the source document and press Delete.

## Creating a master TOC or index for several books

When you produce several related books, you may want to create a master table of contents (TOC) or index for the books.

**Master Index**

*R = Reference; U = User's Guide*

Abrasion, R:29, U:30

glacial, R:26

river, U:20-22

wave, U:31-32

wind, R:32

See also sandstone

Abyssal plain, R:42-43

**To set up a book file to create a master TOC or index:**

1 Create a new book file that contains the files in all the books in order (see "Creating book files" on page 363).

If you're adding files that were generated in the original books, add them to the new book as *document* files (see "Adding files to books" on page 363). If you need to update those generated files, do so from their original book file, not from the master book file.

2 Add a table of contents, an index, or other generated file to the new book file. This generated file will be the master file.

3 Using the book window, specify how volume, chapter, and page numbers for each document should appear in the master generated file. See "Setting up numbering" on page 367.

*Note: When you update the book, the book's numbering options will override the documents' numbering options, unless you select Read from File.*

4 Using the book window, specify the appropriate pagination and page layout options (see "Changing the basic page layout of a document" on page 277).

5 Generate and update the file (see "Updating books" on page 372).

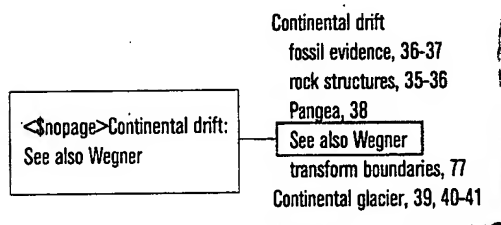
## Troubleshooting indexes

If you type marker text incorrectly, the index will reflect it. The first time you generate an index, problems often appear.

**Missing entries** If an entry is missing entirely from the generated index, do the following:

- Check whether the corresponding marker is an incorrect marker type. You can do this by generating a list of markers that includes all marker types and then searching the list for the entry you want. For details, see "Generating TOCs and other lists" on page 326.

- Check that sorting information is present and correct and appears between brackets ([ and ]) at the very end of the marker text (see “Specifying sort orders in indexes” on page 336). For example, if you want to sort a cross-reference as the last subentry, the sorting information in the marker text for it should end with :zzz.

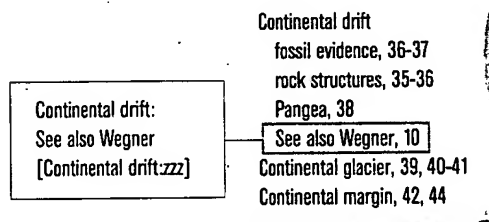


*Missing :zzz and the resulting missorted entry*

- If sorting errors occur in a pattern—for example, if all numeric entries appear at the end of the index rather than at the beginning—check that the sorting information in the special text flow on the reference page is correct. For details, see “Changing the sort order of indexes” on page 353.

#### Page numbers with See or See also cross-references

A cross-reference index entry may incorrectly contain a page number. Make sure that `<$nopage>` appears at the beginning of the marker text for the cross-reference entry.



*Missing <\$nopage> and the page number wrongly appears*

**Bad line breaks** If entries break between numbers in a page range or between the end of the entry and the first page number, do the following:

- Change the characters after which FrameMaker allows line breaks. To disallow line breaks after certain characters, such as an en dash (–), use **Format > Document > Text Options** (see “Changing hyphenation and line breaks” on page 105).
- To force the end of an entry to appear on the same line as the page number, use a nonbreaking space, an en space, or an em space as the separator between them.
- If you specified in the special text flow on the reference page that spaces or hyphens appear between page numbers in a range, make sure they are nonbreaking (see “Editing special text flows for lists and indexes” on page 347 and “Changing hyphenation and line breaks” on page 105).
- Change the volume or chapter numbering for the source document’s page numbers (see “Setting up numbering” on page 367). If the book’s pages are numbered by chapter (1-1, 1-2, ..., 2-1, 2-2, ...), the volume or chapter number should be followed by a nonbreaking hyphen. See “Changing hyphenation and line breaks” on page 105.

Continental drift, 36-37  
Continental drift Pangea, 38-39  
Continental glacier formation, 39, 40-41  
Continental margin, 42, 44

*Bad line breaks*

**Disappearing titles** A title you entered may disappear the next time you generate the index unless you follow the steps in “Adding titles and other static text to lists and indexes” on page 345.

**Disappearing formatting** If your formatting changes (see “Formatting lists and indexes” on page 345) aren’t retained when you regenerate, do the following:

- If you must rename a generated file, do so using the book window. FrameMaker will rename the file in the book window and on disk.
- To retain paragraph and character format changes, store them in the index’s Paragraph or Character Catalog, making them available the next time you generate the index. For details, see “Redefining (updating) formats” on page 121.
- To retain other changes, make them in the special text flow, as described in “Editing special text flows for lists and indexes” on page 347.

## Adding custom marker types

You can create your own marker types and then use them in lists or indexes just as you would any other type of marker. Once a new marker type has been created, it can be shared with other documents and books.

For an example of using custom marker types with indexes, see “Generating indexes” on page 336.

### To add or delete a custom marker type:

- 1 Choose Special > Marker and choose Edit from the Marker Type pop-up menu.

- 2 Do one of the following:

- Type a new name and click Add.
- Choose a name from the pop-up menu and click Delete.

- 3 Click Done.



*You can also use the book window to edit custom marker types. Select the documents you want to affect, and then press Esc e m t.*

### To copy a marker type from one document to another:

Do one of the following:

- Copy a marker or text containing a marker and paste it in another document.
- Choose File > Import > Formats and import Document Properties.

### To rename a marker type:

- 1 Choose Special > Marker and choose Edit from the Marker Type pop-up menu.
- 2 Choose the marker type you want to rename from the pop-up menu and click Change.
- 3 Do one of the following:
  - To rename the specified markers with a new name, enter the new name in the To text box.
  - To rename the specified markers with the name of another marker type, choose the new marker type from the To pop-up menu.
- 4 Click OK, and then click Done.

## Adding titles and other static text to lists and indexes

If you want to add a title or other unchanging text in your list or index, add it after you generate the list or index the first time.

### General Index

**A**  
Abrasion, 29-30  
glacial, 26  
water, 20-22  
wind, 32  
See also Sandstone  
Abyssal plain, 42-43  
Alluvial fan, 22, 43, 46

*Static text as a title in a generated file*

You can also add static text to a template and then use the template to format a list or index (see “Formatting lists and indexes using templates” on page 346).

#### To create a title for a list or index:

- 1 Type the title before the first entry on a body page.
- 2 Create a new paragraph format for the title. The new paragraph tag must not end with the suffix assigned when you created the generated file, such as IX for a standard index or TOC for a table of contents. When you generate the index again, FrameMaker replaces only the paragraphs that have tags ending with the suffix.

## Formatting lists and indexes

The first time you generate a list or index (if you don't use a template as described in “Formatting lists and indexes using templates” on page 346), it uses the page layout of the source document or the first non-generated document in the book, and all entries look the same. You can change the page design and the formats in the list or index after you generate it just as you do in any other document. When you generate the file again, your changes are retained.

For example, you can change the headers and footers, the number of columns of text, and the paragraph and character formats used for entries. You can use a tab and tab leader dots before the page numbers in entries or include the autonumber of a paragraph in an entry. You can also include the chapter and volume numbers in entries.

You can also control the formatting of generated lists or indexes by changing the contents of the special text flow on the reference page of the generated file. The special text flow is created when the list or index is first generated.


For information on changing page design, see Chapter 11, “Page Layout.” For information on changing paragraph and character formats, see “Redefining (updating) formats” on page 121.

## Formatting lists and indexes using templates

You can use a template for a list or index rather than generating the list or index and then making format changes one by one. For information on creating a template for a list or index, see “Creating templates for generated files” on page 315 and most of the remaining sections of this chapter.

**To have FrameMaker use a template for a generated file:**

- 1 Copy the template to the source document's folder using the same filename as the list or index.
- 2 Generate the list or index.

 You can also use **File > Import > Formats** to import a template's formats. Then generate the list or index again so any changes in the special text flow are reflected in the generated file.

## About special text flows

Many formatting aspects of a list or index are controlled by a special text flow on a reference page in the generated file. The name of the reference page matches the default suffix, such as TOC for a table of contents or IX for a standard index.

For generated lists, each paragraph in the flow corresponds to a paragraph tag or marker type you included in the list. These paragraphs have tags that end with the default suffix. For example, a paragraph tagged **Heading1TOC** in the text flow for a table of contents corresponds to the entries for first-level headings (tagged **Heading1** in the source document).

<\$paratext>	
Chapter <\$chapnum>	<\$pagenum>
<\$paratext>	<\$pagenum>
<\$paratext>	<\$pagenum>
<\$paratext>	<\$pagenum>

Special text flow on reference page for a table of contents

For indexes, the paragraphs in the flow correspond to the marker types you included in the index, the levels of entries and subentries, the sort order, the separator text used, and several other index properties.

1, 2-3	A
Level2IX	B
Level1IX	B
Symbols[\ ];Numerics[0];A;B;C;D;E;F;G;H;I;J;K;L;M;N;O;P;Q; R;S;T;U;V;W;X;Y;Z	C
<\$symbols><\$numerics><\$alphabets>	D
	E

Special text flow for an index: A. Separators placeholder  
B. Levels of entries C. Group titles placeholder  
D. Sort order E. Ignore characters placeholder

If the list or index was created with hypertext links, the special text flow also contains a paragraph that specifies the form of the hypertext commands in the generated file. The paragraph's tag begins with the word *Active*.

Special text flows for lists and indexes have special paragraphs with placeholder text. This placeholder text lets you specify how your entries will look when you regenerate the file.

### Editing special text flows for lists and indexes

Building blocks such as <\$pagenum> and <\$paratext> in each paragraph of the special text flow determine the information that appears in the list or index and the order in which the information appears. You can use the following building blocks in the special text flow.

Building block	Meaning
<\$autorange>	Automatically creates index page ranges (see "Using page ranges in index entries" on page 334)
<\$numeric> <\$alphabetic> <\$symbol> <\$kana>	Specifies the overall sort order in an index (see "Changing the sort order of indexes" on page 353)
<\$pagenum>	Displays the page number on which the source paragraph or marker appears
<\$volnum>	Displays the volume number of the document in which the source paragraph or marker appears
<\$chapnum>	Displays the chapter number of the document in which the source paragraph or marker appears

Building block	Meaning
<\$paratext>	Displays the text of the paragraph, excluding any autonumber
<\$paranum>	Displays the paragraph's entire autonumber, excluding spaces and tabs at the end of the autonumber (for example, <i>Section 2.1.1</i> )
<\$paranumonly>	Displays the paragraph's autonumber counters and the characters between them (for example, <i>2.1.1</i> )
<\$paratag>	Displays the source paragraph's tag

#### To edit the special text flow for a list or an index:

- 1 In the list or index, choose View > Reference Pages.
- 2 Display the reference page that contains the text flow you want. (The reference page name matches the default suffix, such as TOC for table of contents or IX for a standard index.)
- 3 Edit the appropriate paragraphs in the text flow. For specific editing instructions, see "Changing paragraph and character formats of entries" on page 348 and the following sections.
- 4 Choose View > Body Pages.
- 5 Generate the index again to see the effect of your changes.

**Note:** Make sure you generate the list or index from the source document, not from the generated file.

## Changing paragraph and character formats of entries

You can change the look of entries in a generated list and index by modifying their paragraph formats.

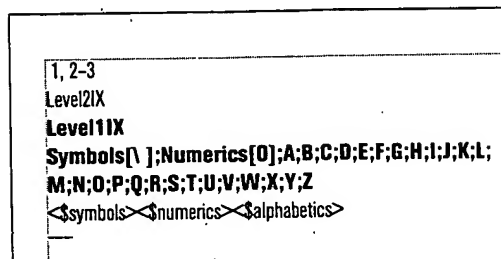
You can also change the character format of any text appearing in a list and of all index page numbers created with the same marker type. For example, you could make all page numbers italic.

**Note:** If you create a new character format in the source document after you generate the list or index, you may have to use **File > Import > Formats** to import the character format into the generated list. This is necessary only if you use the new character format in a paragraph or marker that's part of the list or index. If you created the character format before first generating the list or index, **FrameMaker** imports it for you into the generated file.

### To change the paragraph format of entries:

- 1 In the list or index, display the reference page that contains the special text flow. Usually this is TOC for a table of contents and IX for a standard index.
- 2 Locate the placeholder paragraphs that have paragraph formats corresponding to the list or index entries. (For example, Level1IX is the format for the placeholder text for the first-level index entry, and Head1TOC is the format for a Head1 entry in a table of contents.)

- 3 Change the properties of the paragraph formats, such as indents and font size, and update the paragraph formats, so that they are available the next time you generate the file. For details on modifying formats, see "Redefining (updating) formats" on page 121. The placeholder paragraphs show you how the entries will look.



Formatted placeholder paragraphs

### To change the character format of entries:

- 1 In the list or index, create a new character format and store it in the Character Catalog (see "Applying predefined formats to text" on page 88).
- 2 Choose **View > Reference Pages** and display the reference page that contains the special text flow.
- 3 In the paragraph whose tag corresponds to the entries you want to change, do the following:
  - In a list, enter the character tag between angle brackets (< >) before the text you want to change. To change back to the paragraph's default font, enter <Default Para Font>. For example, you could define a format tagged ChapNumFont and then use it to format chapter numbers in a larger font in a table of contents.

<ChapNumFont> <\$paratext> <Default Para Font>....<\$pagenum>

<b>Chapter 2</b>	<b>35</b>
Pangea	
Continental drift	37
Continental glacier	39

Reference page and the result in the TOC

- In an index, enter the character tag, between angle brackets (< >), to the left of <\$pagenum>. For example, if IndexPgNum is a character format defined for italic page numbers in a standard index, you could use it to format just the page numbers in the paragraphs tagged IndexIX.


<IndexPgNum> <\$pagenum>

## Index

### A

Abrasion, 156, 158	Bonding	Continental drift
glacial, 145	covalent, 33-34	fossil evidence, 36-37
river, 105-6	ionic, 32-33	rock formation, 35-36
wind, 32	metallic, 36	Pangea, 38

Reference page and the result in the index

 You can also change the character format of text that appears in a list or index by applying a character format directly to the building block rather than preceding the building block with a character tag enclosed in angle brackets. Be careful not to apply the character format to the paragraph symbol.

## Including volume, chapter, and paragraph autonumbers

In a generated list, you can include autonumbers—text and numbers inserted automatically as part of a paragraph format—in addition to (or instead of) page numbers in entries. In an index, you can use autonumbers instead of page numbers if all paragraphs that contain index markers are also autonumbered.

Abrasion, §3.1  
glacial, §3.3, §5.9, §6.1  
river, §10.1  
wave, §10.3  
wind, §10.2  
See also Sandstone §6.2

An index using section symbols and section numbers instead of page numbers

You can use the following building blocks to add autonumbers:

- <\$volnum> and <\$chapnum>, which include the volume and chapter counters. See “Determining how documents and pages are numbered” on page 367.

Reference page

Vol. <\$volnum> <\$chapnum> <\$pagenum>

## Index

### A

Abrasion, Vol. 1-3.1	Bonding, Vol. 2-6.3
glacial, Vol. 1-3.3	covalent, Vol. 2-6.4



<ChapNumFont> <\$paratext> <Default Para Font>....<\$pagenum>

## Chapter 2 .....35

### Pangea

Continental drift .....37

Continental glacier .....39

*Reference page and the result in the TOC*

- In an index, enter the character tag, between angle brackets (< >), to the left of <\$pagenum>. For example, if IndexPgNum is a character format defined for italic page numbers in a standard index, you could use it to format just the page numbers in the paragraphs tagged IndexIX.


<IndexPgNum> <\$pagenum>

## Index

### A

Abrasion, 156, 158	Bonding	Continental drift
glacial, 145	covalent, 33-34	fossil evidence, 36-37
river, 105-6	ionic, 32-33	rock formation, 35-36
wind, 32	metallic, 36	Pangea, 38

*Reference page and the result in the index*

 You can also change the character format of text that appears in a list or index by applying a character format directly to the building block rather than preceding the building block with a character tag enclosed in angle brackets. Be careful not to apply the character format to the paragraph symbol.

## Including volume, chapter, and paragraph aut numbers

In a generated list, you can include autonumbers—text and numbers inserted automatically as part of a paragraph format—in addition to (or instead of) page numbers in entries. In an index, you can use autonumbers instead of page numbers if all paragraphs that contain index markers are also autonumbered.

Abrasion, §3.1  
glacial, §3.3, §5.9, §6.1  
river, §10.1  
wave, §10.3  
wind, §10.2  
See also Sandstone §6.2

*An index using section symbols and section numbers instead of page numbers*

You can use the following building blocks to add autonumbers:

- <\$volnum> and <\$chapnum>, which include the volume and chapter counters. See “Determining how documents and pages are numbered” on page 367.

Reference page

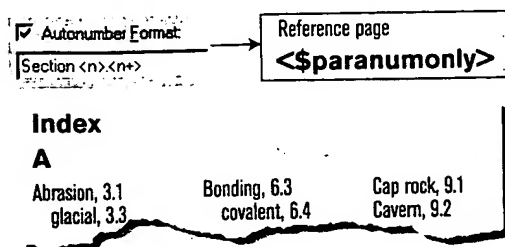
Vol. <\$volnum> <\$chapnum> <\$pagenum>

## Index

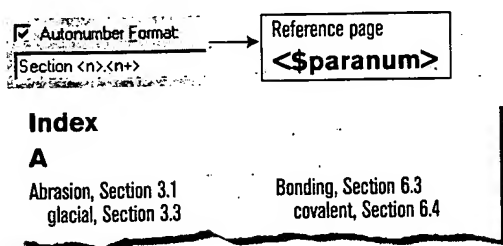
### A

Abrasion, Vol. 1-3.1	Bonding, Vol. 2-6.3
glacial, Vol. 1-3.3	covalent, Vol. 2-6.4

- `<$paranumonly>`, which includes the counters and the characters between them (for example, 2.2 for a paragraph whose autonumber is Section 2.2)




- `<$paranum>`, which includes the counters and all text in the autonumber (except for spaces or tab characters at the end)



#### To include volume and chapter autonumbers:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow.
- 2 In a list or index, type the `<$volnum>` or `<$chapnum>` building block where you want to insert the autonumber.

For example, to include the chapter number along with the page number (such as 3-1) in entries generated from markers of type Index, type `<$chapnum>` before the `<$pagenum>` building block in the paragraph tagged IndexIX.

 To make sure numbers such as "3-1" don't break between lines, insert a nonbreaking hyphen by pressing Esc hyphen h. See "Changing hyphenation and line breaks" on page 105.

#### To include paragraph autonumbers:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow.
- 2 Do one of the following:

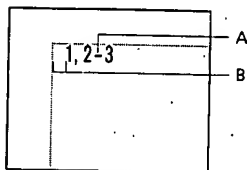
- In a list, type the `<$paranumonly>` or the `<$paranum>` building block where you want to insert the autonumber.
- In an index, replace the `<$pagenum>` building block with `<$paranum>` or `<$paranumonly>` in the paragraph with the tag that begins with the marker type. For example, to include the paragraph autonumber rather than the page number in entries generated from markers of type Index, replace the `<$pagenum>` building block in the paragraph tagged IndexIX.

## Changing page number separators

A typical index entry such as *Erosion 1, 2-3* includes a space after the entry text, a comma and a space between page numbers, an en dash to show a page range, and nothing after the last number. You can change the en dash to the word *to* or change this separator text in any other way. For example, you could change the separator text so that a comma appears after the entry, such as *Erosion, 1*.

### To change page number separators:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow.
- 2 Edit the Separators paragraph. (Look for the paragraph containing 1, 2-3.) You can change any separator, but you must use the placeholder numbers 1, 2, and 3.



A custom Separators paragraph on the IX reference page:  
A. En dash B. Em space

## Manually adding text to entries

You can add text to all entries generated from paragraphs with a particular tag or markers of a particular type. For example, you can enclose page numbers in brackets.

Continental drift .....	(110)
Fit of the Continents .....	13
Fossil Evidence .....	16
Paleoclimatic Evidence .....	34

Brackets added in a TOC

You can also use custom marker types with added text to display page numbers in a variety of ways in an index. For example, suppose you want to generate the following scholarly index.

Continental drift	30, 47
fossil evidence, 36, 38	<i>ff</i>
rock structures, 37	<i>note</i> , 42
Pangea,	38
See also	Wegner
Continental glacier,	39, 41
Continental margin,	42, 44
Continental rise,	45-47
Continental shelf	50

To do this, you need two custom markers: one for page numbers followed by *ff*, and one for page numbers followed by *note*. You might call these markers Indexff and IndexNote.

When generating the index, you include all three marker types (Index plus the two new ones). After generating the index for the first time, you can edit the special text flow for the marker types on the reference page.

Marker type	Edit to the reference page	Result
Indexff	<\$pagenum> ff	15 ff
IndexNote	<\$pagenum> note	15 note

The next time you generate the index, the changes appear in the generated index.

#### To manually add text in an entry:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the list or index.
- 2 Enter the text where you want it to appear. For example, to enclose all page numbers in brackets, enter brackets around the page number building blocks: <\$paratext> [<\$pagenum>]

#### Using tabs and tab leaders

You can use tabs to align page numbers in a list or index. You can also use tabs to add tab leaders, such as a row of dots, between entry text and page numbers.

<b>Continental drift</b>	10
Fit of the Continents	13
Fossil Evidence	16
Paleoclimatic Evidence	34

*Right-aligned tab stop with leader dots in a TOC*

#### Ind x

<b>A</b>	
Abrasion	14, 29, 30
glacial	26
water	20-21, 40
wind	40, 132

*Tab stops make index page numbers line up in columns.*

#### To use tabs and tab leaders in a list:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the table of contents or list.
- 2 Select the space between the <\$paratext> and <\$pagenum> building blocks in the paragraph whose tag matches the entries you want to change, and then press Tab.
- 3 Change the paragraph format of the entries by adding a tab stop where you want to align the page numbers (see "Changing tab stops" on page 99). Define the format to include leader dots, if you want. Then update the paragraph formats so the changes are available the next time you generate the list. For details, see "Redefining (updating) formats" on page 121.

#### To use tabs and tab leaders in an index:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the index.
- 2 Select the space before the number 1 in the Separators paragraph, and then press Tab.

**3** Change the paragraph format for each level of the index by adding a tab stop where you want to align the page numbers (see “Changing tab stops” on page 99). Define the formats to include leader dots, if you want. Then update the paragraph formats of all entries at each level of the index, so the changes are available the next time you generate the index. For details, see “Redefining (updating) formats” on page 121.

### Rearranging information in list entries

You can specify the order in which the parts of a list entry appear. For example, you can specify that the page number appear first, followed by the paragraph text.

#### To rearrange information in list entries:

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the table of contents or list.
- 2 Rearrange the building blocks. For example, to put the page number first, followed by the paragraph text, rearrange the building blocks:  
<\$pagenum> <\$paratext>.

### Changing the sort order of indexes

Indexes are sorted so that special symbols appear first, numbers appear second, and alphabetic characters appear last. By default, a few punctuation characters are ignored in sorting and alphabetic characters appear in the correct sort order for the English language.

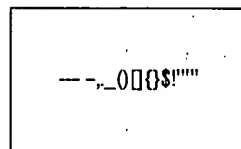
You can change the sort order of index entries—for example, to sort alphabetic characters based on the sort order for another language. You can also change whether the index sorts entries letter by letter or word by word.

Sorted letter by letter	Sorted word by word
Seabed	Sea level
Sea level	Sea walls
Seasonal change	Seabed
Sea walls	Seasonal change

You change the sort order by editing the contents of the IgnoreChars and the SortOrder paragraphs in the special text flow of the reference page for the index. For information, see “Editing special text flows for lists and indexes” on page 347 and the following sections.

### Specifying characters to ignore

By default, FrameMaker ignores hyphens, nonbreaking hyphens, en dashes, and em dashes when sorting index entries. You can specify other characters to be ignored—for example, underscore characters, periods, brackets, braces, and quotation marks.



*An IgnoreChars paragraph with added characters*

**To specify the characters to ignore when sorting an index:**

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the index.

- 2 Edit the IgnoreChars paragraph.

*Note: If you're working with Japanese fonts, you may want to include the Chouon character ( — ) in the IgnoreChars paragraph. The Chouon character is normally used in Japanese to lengthen the vowel sound that it follows, but you probably won't want it to affect the sort order.*

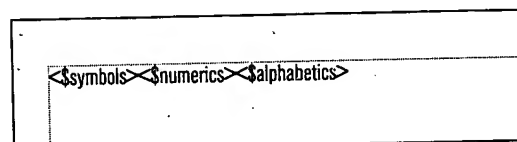
**To sort letter by letter instead of word by word:**

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the index.

- 2 Add a space at the beginning of the IgnoreChars paragraph in the special text flow of the index. (The space cannot be at the end of the paragraph.)

## Specifying sort order

The SortOrder paragraph in the special text flow contains building blocks that control how characters are sorted in an index.



SortOrder paragraph

Each sort order building block represents several characters in a particular order. The following table shows the order for US English. The alphabetic sort order differs slightly for other languages.

Building block	Characters, in this order
<\$numerics>	0 1 2 3 4 5 6 7 8 9
<\$alphabetics>	A Á Â Ã Ä Å Æ Ç È É Ê Ë Ì Í Î Ï Ñ Ò Ó Ô Õ Ö Ø Ù Ú Û Ü Ý Þ ß à á â ã ä å æ ç è é ê ë ì í î ï ñ ò ó ô õ ö ø ù ú û ü ý þ ß Ww Xx Yÿ Zz
<\$symbols>	All other characters in ASCII order

**To sort symbols, numbers, or other characters in another location in an index:**

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the index.

- 2 Rearrange the building blocks in the SortOrder paragraph in the special text flow. For example, to put symbols at the end of an English-language index instead of at the start, arrange the building blocks as follows:

<\$numerics><\$alphabetics><\$symbols>

**To specify your own sort order:**

- 1 Choose View > Reference Pages and display the reference page that contains the special text flow for the index.

2 Replace a building block in the SortOrder paragraph with the specific characters in the order you want them sorted. Follow these rules when entering a new sort order:

- If you replace <\$alphabetics> with individual characters, separate the letter groups with a space. (*Letter groups*—for example, Fff—are characters that are sorted as if they were the same character, unless they are the only characters that differ in the sorted text. In that case, the first character in the string appears first.)
- If you replace <\$symbols> with individual characters, use a backslash before the angle bracket symbols (< and >).
- Don't press Return at the end of a line. Let FrameMaker wrap the characters automatically from line to line.
- To indicate that a letter pair should be sorted as a single character, specify the letter pair between angle brackets (< >)—for example, CÇcç<CH><Ch><ch>. In this example, all the characters or letter pairs are in the same letter group (the letter C). The letter pair CH is sorted after the letter C, and uppercase letter pairs are sorted before lowercase letter pairs.

## About Japanese sort order

A document that uses Japanese fonts includes the <\$kana> building block, which controls sorting of Japanese kana (hiragana and katakana).

Building block	Characters, in this order
<\$kana>	Symbols[\], Numerics [0], A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, あ, い, う, え, お, か, き, く, け, こ, さ, し, す, せ, そ, た, ち, つ, て, と, な, に, ぬ, ね, の, は, ひ, ふ, へ, ほ, ま, み, む, め, も, や, ゆ, よ, ら, り, る, れ, ろ, わ, を, ん

Single-byte (half-width) katakana are converted to double-byte katakana in the generated file when sorted. The sort order of kanji is determined by its kana pronunciation (yomi-kana), as illustrated in "Specifying sort orders in indexes" on page 336. Because of this, the <\$kana> building block also controls how most kanji sort.

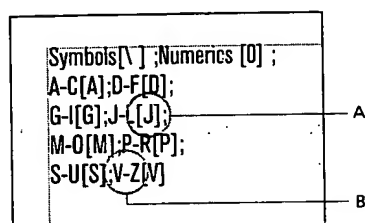
The sort order of kanji without yomi-kana and of Japanese symbols (double-byte numerics and Roman alphabets) is not included by default in the <\$kana> building block. Instead, kanji is sorted by code value and appended after characters sorted by <\$kana>.

If you want to sort kanji without yomi-kana and Japanese symbols differently, add these characters to the <\$numerics>, <\$alphabetics>, or <\$kana> building blocks. For example, double-byte Japanese characters could be added to the <\$symbols> building block.

## Working with group titles in indexes

Index entries are initially grouped one letter at a time—all the A's, all the B's, and so on—using the uppercase letter as a group title. In a small index or when only a few entries appear under some letters such as X, Y, and Z, you may want to group letters differently and change the group titles.

FrameMaker inserts group titles as if they were index entries but uses a different paragraph format. It uses the labels and sort positions you specify in the GroupTitles paragraph in the special text flow.



An edited GroupTitles paragraph on the IX reference page  
A. Sorting information B. Group title

J-L	S-U	V-Z
Jetty, 96, 108	Salt dome, 70	Valence electron
Joint, 115	Sedimentary rock	Ventifact, 99-101
Kaolinite, 105-6	chemical, 33-34	Viscosity, 82
Kettle, 132	detrital, 32-33	Wash, 134-35
Lava, 46	type, 136-40	Wave, 145-51
Lithification, 78	Shale, 137-38	characteristics, 4
Levee	Silicate, 39-46	oscillation, 51
artificial, 110	ferromagnesian, 42	refraction, 47-49

The result in the index

### To change the groupings and group titles:

1 Choose View > Reference Pages and display the reference page that contains the special text flow for the index.

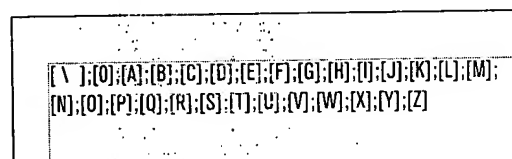
2 Edit the GroupTitles paragraph in the special text flow. For example, edit the group titles (the characters between semicolons, excluding bracketed text), or delete group titles you don't want. Type text between brackets ( [ and ] ) to specify where you want the group titles sorted.

For example, to collapse all entries that start with V through Z into a single group whose title sorts under V, edit the GroupTitles paragraph so that its last entry is V-Z[V].

**Note:** The first two entries in the GroupTitles paragraph define what group titles to use for symbols and numbers and where to place these titles. You can change the titles, but changing the sort information of these two groups might give unexpected results.

### To create an index without group titles:

Edit the GroupTitles paragraph in the special text flow to look like this:





**To create an index with neither a group title nor a space between entry groupings:**

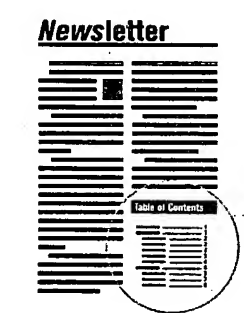
Delete all the text in the GroupTitles paragraph in the special text flow, but don't delete the paragraph symbol.

**To create quick access to group titles in a hypertext document:**

Generate clickable thumbtabs to the group titles to make navigating through the index easier. For information, see "Adding hypertext links to generated files" on page 443.

## Embedding tables of contents in a document

A typical table of contents is a separate file whose contents are mostly automatically generated by FrameMaker. However, if you want a small table of contents embedded at the start of a document instead of being a separate file, you can create such a table of contents with cross-references.



*A TOC embedded at the start of a document*

FrameMaker does not automatically maintain this type of table of contents. If you change the order of references or delete a heading while editing the document, you'll need to rearrange the entries or delete an entry in the table of contents yourself.

Another approach is to generate a separate table of contents and then import the generated file by reference. The resulting text inset in the document is automatically updated when the table of contents changes. For information, see "Importing formatted text" on page 402.

**To embed a TOC in a document by using cross-references:**

- 1 Create a cross-reference format that formats text the way you want the table of contents entries to look. Typically, this format would contain the `<$paratext>` and `<$pagenum>` building blocks. For details, see "Creating cross-reference formats" on page 171.
- 2 At the start of the document, set up a cross-reference to each paragraph you want to appear in the table of contents (see "Inserting cross-references" on page 168). Use the cross-reference format you created in the previous step.

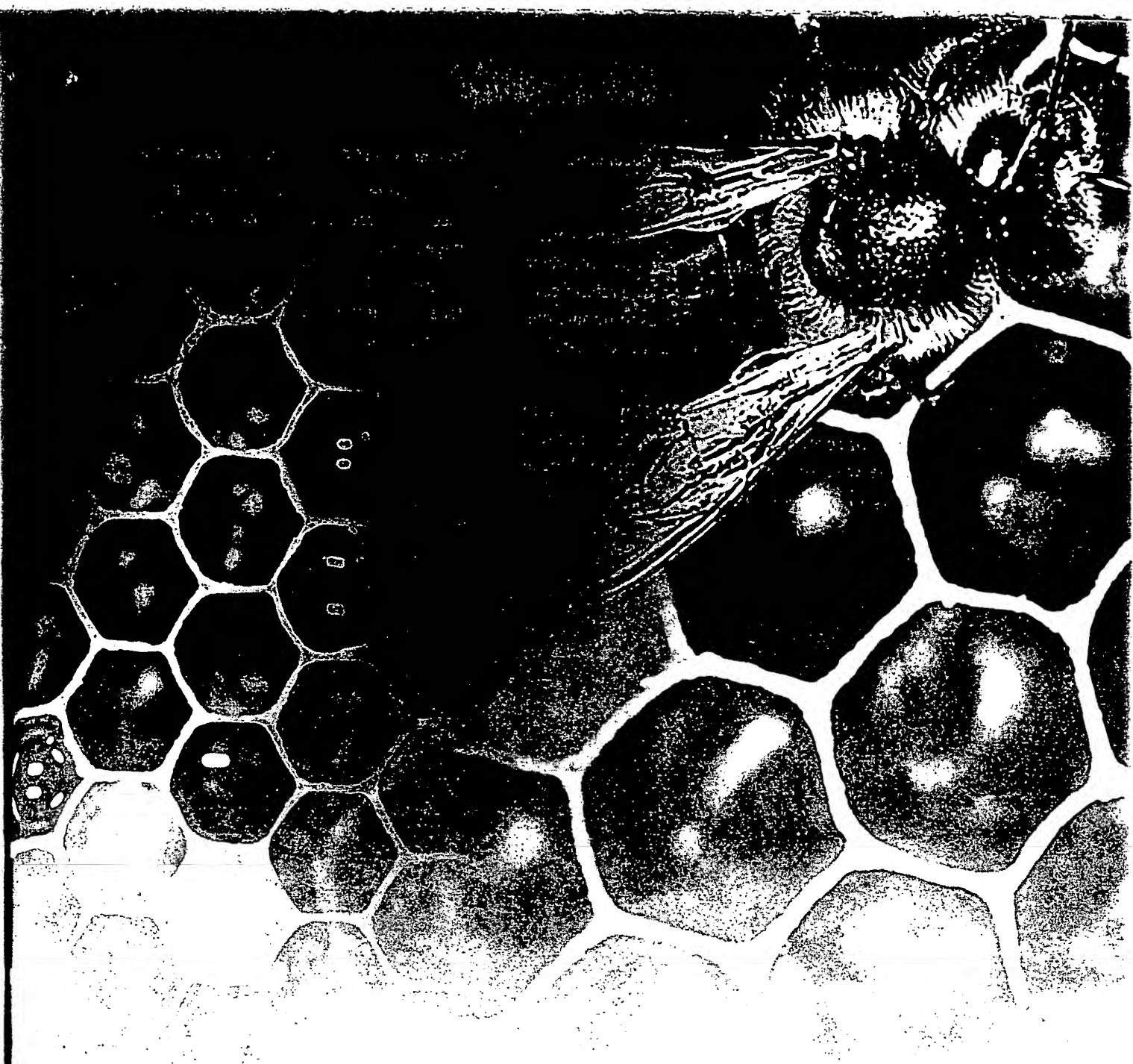
**To maintain a TOC embedded in a document:**

Do the following:

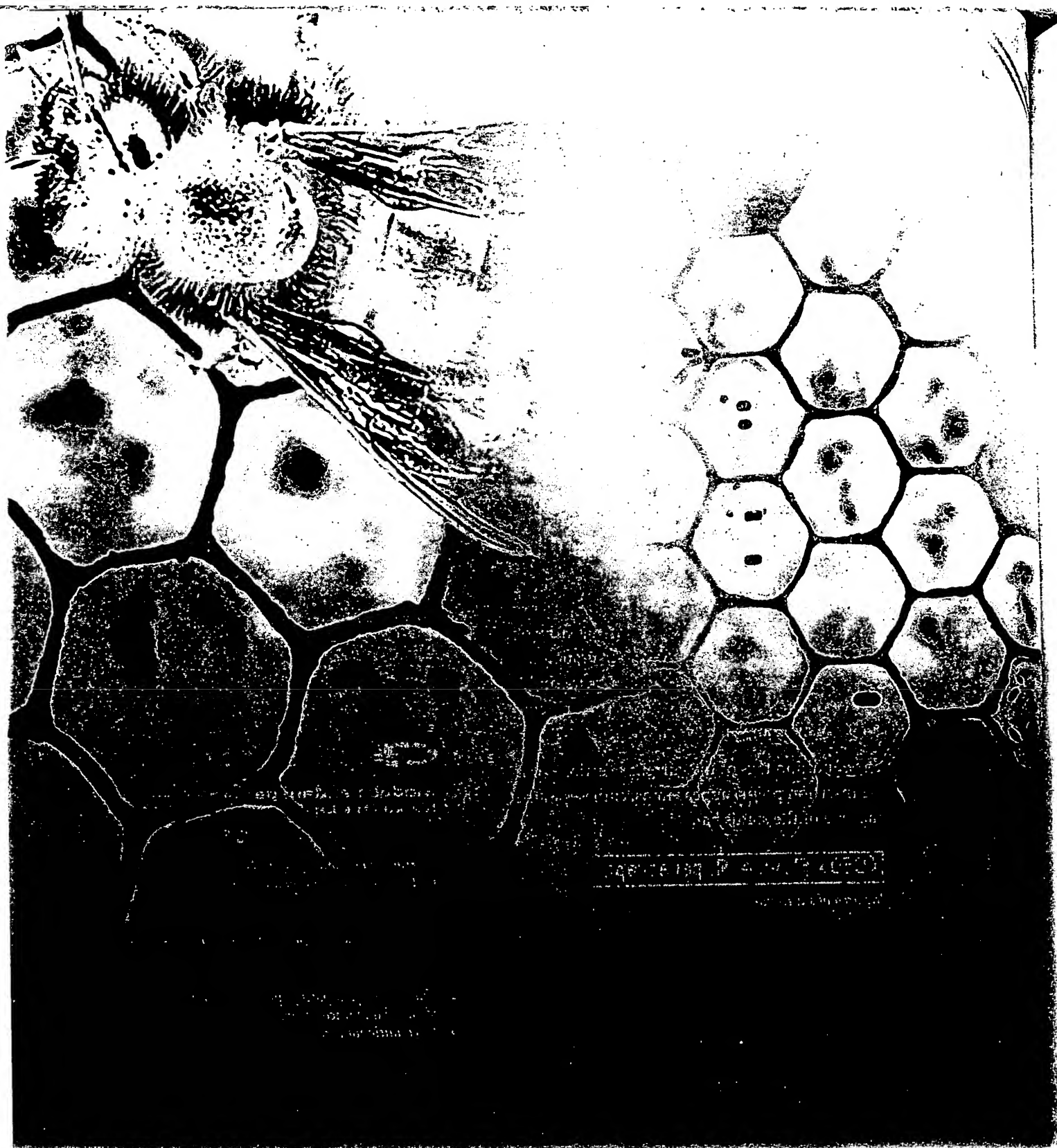
- If you change the order of paragraphs while editing the document, rearrange the cross-references to be in the same order as the references. Then update the cross-references to update the table of contents (see “Maintaining cross-references” on page 175).
- If you delete a paragraph that’s included in the table of contents, delete the cross-reference to it. Otherwise, the table of contents entry will be an unresolved cross-reference.

**To embed a TOC in a document as a text inset:**

- 1 Generate a table of contents in the usual way (see “Generating TOCs and other lists” on page 326).
- 2 Import the table of contents into a document (see “Using the Import command to import text” on page 402).



15



# Chapter 15: Conditional Text

If you're preparing several versions of a document, each with minor differences, you can use one FrameMaker document for all the versions. The one document contains conditional text and conditional graphics.

You can also use conditional text to include comments to yourself or to your reviewers. You can hide the comments before you print the final copy.

## About conditional text

Conditional text differs from one version of a document to another. Unconditional text is common to all versions.

You can make any unit of text conditional, from one character to entire sections. Anchored graphics, tables, cross-references, footnotes, markers, and table rows can be conditional. You make an item conditional by applying *condition tags*.

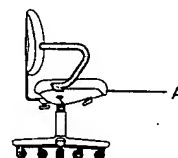
The condition tags of the current selection (or at the insertion point) appear in parentheses in the Tag area of the status bar.

**(CEO) Flow: A ¶: paragraph**

Tag area of status bar

**TWO VERSIONS OF A DATA SHEET** Conditional text can be used to create two data sheets in one document. The text and graphics common to both data sheets are unconditional. The text and graphics that appear in only one data sheet are assigned a condition tag that identifies the data sheet.

### ModuLine CEO Low-Back Executive Seat Model 225K/YR

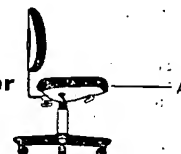


*Covering options include Corinthian leather in 5 textures and tones, or natural cotton and wool coverings in over 20 colors, all with stain-proof and tear-proof linings.*

*Backed by ModuLine's money-back guarantee.* — B



### ModuLine Manager Low-Back Office Seat Model 186P



*Covering options include natural cotton and wool coverings in 8 hues, all with stain-proof and tear-proof linings.*

*Backed by ModuLine's money-back guarantee.* — B

- A. The art and first paragraph contain both conditional and unconditional information.
- B. Unconditional text.

You can change the appearance of conditional text so that it's easy to identify by using *condition indicators*—style and color changes.

*Covering options include Corinthian leather in 5 textures and tones, or natural cotton and wool coverings in over 20 colors, ~~8 hues~~, all with stain-proof and tear-proof linings.*

*Backed by ModuLine's money back guarantee.*

Condition indicators (strikethrough and underline) identify two conditions.

You can view and print conditional text in several ways. For example, you can view all versions of the document or hide selected versions, or you can show or hide condition indicators. Whatever you display appears in the printed document.

## Planning conditional documents

When planning a conditional document, you should examine the nature of the material and, because others may have to work in or maintain a conditional document you create, look at how several people can take turns working with it. Plan to treat conditional material consistently to make the document easier to use and maintain. Others will need to know the conventions you followed as you applied condition tags.

Use the following guidelines when planning a conditional text project.

**Number of versions** Define how many versions your finished project will contain. For example, if you're creating a manual that describes a program that runs on both Windows and UNIX platforms, you might want to be able to produce at least two versions: a Windows version and a UNIX version. If you want to produce these versions with editorial comments sprinkled in the text during the review process, you'll want even more versions: UNIX with comments, UNIX without comments, Windows with comments, and Windows without comments.

**Number of condition tags required** Decide how many condition tags you need to produce the desired versions. A version of a document is defined by a unique set of condition tags. For example, a version of a finished Windows manual might be defined by having a Windows condition tag showing, a UNIX condition tag hidden, and a Comments condition tag hidden. In this example, you would need to decide whether to use one condition tag for Windows comments and another for UNIX comments, or whether to use a single condition tag for both Windows and UNIX comments.

**Organization of content** Evaluate the extent to which the document can be conditional and how you can organize the material to simplify development and maintenance. For example, you might be able to organize a book so that conditional text is limited to a few documents. Or you might choose to keep versions of a particular chapter in separate files rather than in conditional text, and then use a different book file for each version of the book.

**Graphics** If a document will contain graphics imported by reference into a conditional anchored frame, create separate folders for the graphics in each version. This simplifies file management when you need to copy or archive a version of the document with its graphics files.

**Variables** Words and phrases that are used repeatedly in a document—for example, product and company names—are easier to work with as variables than as conditional text.

Decide whether your conditional documents will need different variable definitions for each version. For example, the data sheet illustrated in “About conditional text” on page 379 may use a variable with the product’s name, but the conditional document describes two products. You can create a template for each version of the document. Each template should have only one version visible and should define the variables for that version. You can then use File > Import > Formats to switch the variable definitions from one version to another.

**Tagging strategy** Determine the smallest unit of conditional text. For example, if a conditional document will be translated to another language, a whole sentence should be the smallest amount of text you make conditional. Because word order often changes during translation, using conditional text for part of a sentence could complicate translation.

Decide whether to make spaces and punctuation conditional. If conditional text begins or ends with punctuation, make the punctuation conditional too. This makes the text easier to read when you’re viewing more than one version.

To avoid word spacing problems, such as having an unconditional space followed by a conditional space, set standards for handling spaces following conditional text (either always conditional or always unconditional).

Decide the order in which conditional text will appear and use this order throughout the document. The order can help subsequent authors maintain the document.



**ModuLine CEOManager**

Low-Back Executive Office Seat

Model 225K/YR+86P


*Text in the CEO condition always appears first.*

**Multiple authors** If a conditional document will have several authors, follow these guidelines:

- Plan document organization and work flow. For example, you may want to break a document into small files so several people can work on different parts of the document at the same time.
- Decide how you will provide explanatory notes to other authors. To help explain a conditional document, add helpful comments and apply the predefined Comment condition tag to them.

## Creating, changing, and deleting condition tags

When you create condition tags, use condition indicators so that you can distinguish text in one version from text in another. If your conditional document will be used to create more than two versions, use color indicators.

 *If another document contains the conditional text settings that you want to use in your current document, import them by choosing File > Import > Formats. For information, see “Importing and updating formats” on page 317 and “Changing the format of files in a book” on page 371.*

### To create or change a condition tag:

- 1 Choose Special > Conditional Text.
- 2 If you're changing a condition tag's indicators, select the condition tag in one of the scroll lists.
- 3 Click Edit Condition Tag.


4 If you're creating a condition tag, enter a name in the Tag text box. Try to use meaningful names that begin with a unique first letter for quick tagging from the keyboard.

5 Specify style and color condition indicators and click Set.

***Note:** Conditional text appears in magenta when it is assigned two or more overlapping condition tags that use different colors as condition indicators. For this reason, you might not want to use magenta to indicate a particular condition.*

### To delete a condition tag from a document:

- 1 In the Conditional Text dialog box, select the tag you want to delete and click Edit Condition Tag.
- 2 Click Delete. FrameMaker removes the condition tag from any text that uses it and deletes the tag from the Conditional Text dialog box. If any text is tagged with only the condition tag you're deleting, a dialog box appears, in which you choose either to make the text unconditional or to delete it.


 *If you want to delete condition tags that aren't used in a document but you're not sure which condition tags are used, use Special > List of > References to generate a list of references that includes condition tags (see “Generating TOCs and other lists” on page 326).*



## Applying and removing condition tags

To make text conditional, you apply tags by using the Conditional Text dialog box or the keyboard, or by copying and pasting condition tag settings.

You can also use the Find/Change command to paste condition tag settings. For details, see “Searching for conditional text” on page 67 and “Changing items you find” on page 69.

 You can merge two versions of a document into one conditional document. When you merge two versions, FrameMaker compares them and creates a composite conditional document. For information on comparing and merging documents, see “Comparing document versions” on page 394.

### To apply a condition tag to an item:

1 Select the item you want to make conditional, as described in the following table.

To make this conditional	Select
Text in a text frame, table cell, or footnote	Text
Anchored frame and its contents	Frame's border or anchor symbol
An entire table	Table's anchor symbol
Table row	Whole row
Cross-reference or variable	Cross-reference or variable text
Footnote	Footnote reference (the number in the main text)
Marker	Marker symbol

To make the text you're about to type conditional, click where you want the text to begin.

**Note:** You can make text in text frames conditional, but not text in text lines.

2 Choose Special > Conditional Text. The Conditional Text dialog box shows the condition tags of the selected text.

3 Move the condition tags to the appropriate scroll lists by doing the following:

- To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag.
- To move all tags from one scroll list to another, select a tag in the list and Shift-click an arrow.

To include text in a condition, move the condition tag to the In scroll list. To exclude text from a condition, move the condition tag to the Not In scroll list. Condition tags in the As Is scroll list will not be applied or removed.

4 Click Apply. If text is selected, FrameMaker applies the settings to the text. If you have put an insertion point in the document, the settings apply to text you type until you move the insertion point or press Return.

If you apply a condition tag that's currently hidden, the selected text disappears unless it's also tagged with a condition that is showing. For information on viewing hidden text, see “Changing the view of conditional documents” on page 385.

**To apply a condition tag by using the keyboard:**

- 1 Select the item to which you want to apply a condition tag and press Control+4.
- 2 At the status bar prompt, start typing the tag name. You may need to type only a few characters before the name appears in the Tag area. Type lowercase letters to search forward; type uppercase letters to search backward. You can also use the Up Arrow and Down Arrow keys to scroll through the tags.
- 3 Press Return to apply the condition tag. If you decide to cancel the operation, click in the document without pressing Return.

**To copy and paste condition tag settings:**

- 1 Put the insertion point in text that uses the condition tag settings you want to copy.
- 2 Choose Edit > Copy Special > Conditional Text Settings.
- 3 Make a selection or click to place the insertion point.
- 4 Choose Edit > Paste. If you paste the settings into a different document, the pasted tags appear in that document's Conditional Text dialog box so you can use them again.

**Avoiding unresolved cross-references**

If you insert a cross-reference to a paragraph (such as a heading), and if the first word in the paragraph is conditional, the Cross-Ref marker that FrameMaker inserts will also be conditional (with the first word's condition tag settings). This means the marker will be hidden when you hide the first word's conditions. As a result, the cross-reference may be unresolved if condition tag settings of the cross-reference and of the cross-reference marker differ.

To avoid this, select just the Cross-Ref marker at the beginning of the source paragraph, and make it unconditional. The marker will always be visible, so the cross-reference will be resolved no matter which version is visible.

**Removing condition tags from an item**

Removing a condition tag from an item is different from deleting a tag from a document. When you remove a tag from an item, the tag remains in the document so it can be applied again later. When you delete a tag from the document (see "Creating, changing, and deleting condition tags" on page 382), FrameMaker removes the condition tag from any text that uses it and deletes the tag from the Conditional Text dialog box.

**To remove a condition tag from an item:**

- 1 Select the item with the tag you want to remove and choose Special > Conditional Text.
- 2 Do one of the following:
  - To remove some condition tags but leave the text conditional, move the condition tags you want to remove to the Not In scroll list. (To move a condition tag between scroll lists, select the tag and click an arrow or double-click the tag.)
  - To remove all condition tags and make the text unconditional, click Unconditional.
- 3 Click Apply.

**To remove a condition tag from an item using the keyboard:**

- 1 Select the item from which you want to remove condition tags and press Control+5.
- 2 At the status bar prompt, start typing the tag name. You may need to type only a few characters before the name appears in the Tag area. Type lowercase letters to search forward; type uppercase letters to search backward. You can also use the Up Arrow and Down Arrow keys to scroll through the tags.
- 3 Press Return to remove the condition tag from the item. If you decide to cancel the operation, click in the document without pressing Return. If the selection contains only the condition tag you're removing, a dialog box appears in which you choose either to make the text unconditional or to delete it.

**To remove all condition tags using the keyboard:**

Select the item from which you want to remove all condition tags (thus making the item unconditional) and press Control+6.

## Working in conditional documents

You can view or print all unconditional and conditional text simultaneously, or you can hide the conditional text of one or more versions.

FrameMaker ignores hidden conditional text when formatting a document. When text symbols are visible, hidden conditional text is represented on-screen by a conditional text marker (T).

*Covering options include natural cotton and wool coverings in 18 hues, all with stain-proof and tear-proof linings.*

*Backed by ModuLine's money back guarantee.*

Markers show where conditional text is hidden.

## Changing the view of conditional documents

A conditional document can display any number of conditions at a time and can have any of its condition indicators on or off. For example, you can change the view to display the condition tags for one particular version, for several versions, or for all versions. If you're displaying more than one version, or if you're showing one version and want to see which part is conditional, you may want the condition indicators on.


**To change the view of a conditional document:****1** Do one of the following:

- To change the view of a conditional document, choose **Special > Conditional Text**, and then click **Show/Hide**.
- To use the book window to change the view of conditional documents, select the documents you want to affect, and then choose **View > Show Conditional Text** or **Hide Conditional Text**.

**2** Specify the condition tags of the text you want to show by doing one of the following:

- To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag.
- To move all tags from one scroll list to the other, select one tag in the list and Shift-click an arrow.

**3** Indicate whether you want to display condition indicators and click **Set**. When text has more than one condition tag, the text will be visible if any of its tags are in the **Show** scroll list.

 *To switch the view of a document quickly from one version to another, create a template for each version. Each template should have the appropriate Show/Hide settings for a version. You can then use **File > Import > Formats** to change the view of a conditional document from the template (see “Importing and updating formats” on page 317 and “Changing the format of files in a book” on page 371).*

**Viewing imported conditional text**

When you import text containing passages of conditional text, all the condition tags applied to text in the source document are imported so that you can use them to show or hide imported conditional text. Even if the text is imported by reference and appears in a text inset, you can change the view of conditional text in the inset.

Whether a passage of conditional text is initially shown or hidden when you import it is determined by the following:

- When **Show All** is on in the destination document, all conditional text is initially shown.
- Otherwise, when condition tags match, conditional text is initially shown or hidden according to the settings in the destination document. When condition tags don't match, conditional text is initially shown or hidden according to the settings in the source document.

**Editing conditional text**

When you work in a conditional document, hidden text is generally ignored. This means, for example, that the **Find/Change** and **Spelling Checker** commands check only displayed text. However, you can cut, copy, and paste hidden text by selecting the conditional text marker and by using the commands on the **Edit** menu.

Work with text symbols turned on when you're working in a conditional document. Conditional text markers alert you to text that is in other versions of the document.

**To edit conditional text:**

Use the Edit menu commands as usual.

When you copy text, FrameMaker copies its conditional text markers and condition tag settings. When you paste text with a condition tag that's not in the destination document, FrameMaker adds the tag to the destination document. When you try to move or delete hidden conditional text, FrameMaker displays an alert message that lets you proceed and delete the text or cancel the command.

**To apply format changes to hidden text:**

Use Format > Paragraphs > Designer and Format > Characters > Designer. Paragraph and character format changes you apply to selections don't update conditional text hidden within the selection. To apply a format change to all paragraphs or characters, including hidden conditional text, click Update All in the designer or choose Update All from the Paragraph Format pop-up menu on the formatting bar.

Applying format changes with Import > Formats also updates hidden conditional text.

**To spell-check or search through all text:**

Show all conditional text (see "Changing the view of conditional documents" on page 385) before using Edit > Spelling Checker or Edit > Find/Change.

**Finding conditional text**

You can search for items tagged with a visible condition tag. FrameMaker will find conditional text in text frames, graphic frames, and table cells, but will not find conditional table rows. For details, see "Searching for conditional text" on page 67.

**Finalizing conditional documents**

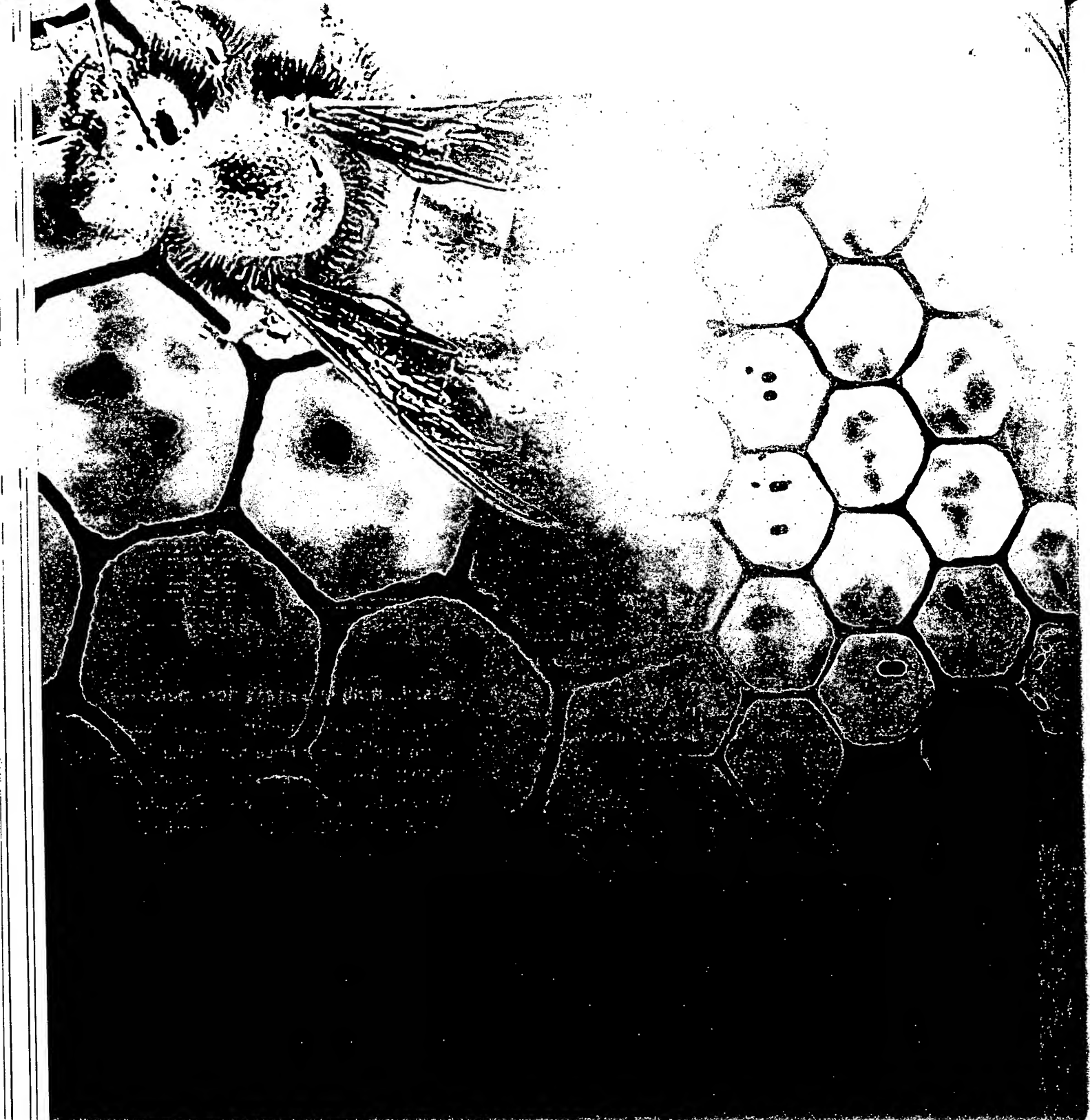
Before you produce a finished version of a conditional document, follow these guidelines:

- Change your view of the document to include only the version you want to print, and turn off condition indicators.
- If your document contains variables, make sure the variable definitions are correct for the version you're printing.
- Spell-check the document. This will catch double spaces and punctuation problems caused by incorrectly tagged conditional text.

- Update cross-references. If the document contains unresolved cross-references, they may refer to Cross-Ref markers in hidden conditional text. Show the version and update the cross-references again. For information on resolving cross-references, see “Resolving cross-references” on page 177. Also see “Avoiding unresolved cross-references” on page 384.
- Create a copy of the document for each version before manually adjusting line and page breaks. Use the copy for each version for making the adjustments and for printing. These adjustments will differ with each version. Use the original document for future edits.
- If the document is part of a book, update the book and its generated files. If the book contains documents with different condition indicators for the same tag, or if some condition tags are displayed in one document but are hidden in another, FrameMaker displays an alert message. If this occurs, click Cancel to stop generating and correct your documents’ conditional text settings.
- After generating an index, check it for double question marks (??), which indicate missing or incorrect index markers. For information, see “Troubleshooting indexes” on page 341.



18





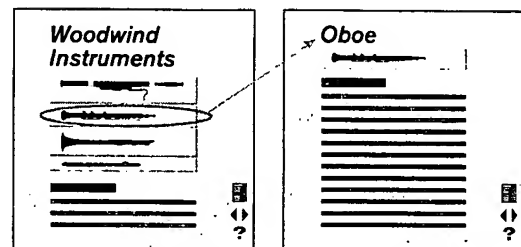
# Chapter 18: Hypertext and View-Only Documents

**Y**ou can distribute hypertext documents online as part of an *online system*. Readers can then page through the contents sequentially or explore at random, following the links you provide. You can create a simple online system from documents that you print (including a table of contents and index that contain hypertext links), or you can create a more elaborate online environment that contains extensive navigation aids such as document maps and navigation buttons.

## About online systems

When you set up an online system, you create a series of hypertext documents. In each document, you designate active areas. An active area contains a hypertext command that instructs FrameMaker how to respond when a reader clicks there.

For example, readers might click in a list to learn about a specific item, click part of a graphic for a more detailed drawing of that part, or click in an index for information about the indexed term. They can choose a topic from a pop-up menu, or they can click buttons to navigate through a document.



Click an active area to display related information.

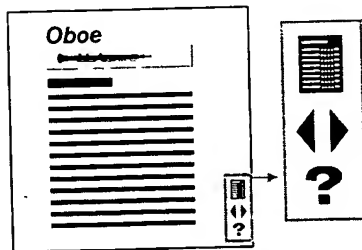
## Distributing hypertext documents

You can save a document in Portable Document Format (PDF) or in Hypertext Markup Language (HTML) format for distribution on the World Wide Web or on an intranet—see Chapter 19, “HTML, XML, and PDF Conversion.”

You can also distribute your hypertext documents to readers in View Only format. Readers can use FrameMaker to open, read, search, and print such documents and they can use the embedded hypertext links, but they can't edit the documents. If your readers don't have FrameMaker for reading online hypertext documents, you can arrange to distribute FrameViewer with your hypertext system. With FrameViewer, readers can open and navigate through documents and also use standard commands such as Print, Copy, and Find.

### Planning online systems

Creating effective and easy-to-use online documents takes careful planning. You need to design a page-size and layout that's appropriate for the type of computer the document will be read from and for the type of reader who will use it. Well-designed online systems often include graphics or symbols (in the same place on each page) that the reader can click to navigate through the system.



*Navigation aids are important in an online system.*

When creating documents for online distribution, follow these simple guidelines:

- Write several short documents rather than one long one. A long document takes longer to open.
- Keep all the documents that make up the system together in one folder. Then you won't have to keep track of pathnames for imported graphics and for hypertext commands that require filename specifications.
- If you'll distribute the documents as FrameMaker files, use fonts that are readily available. You may want to use fonts such as Times and Helvetica because these fonts are available on most computers and on all PostScript printers.

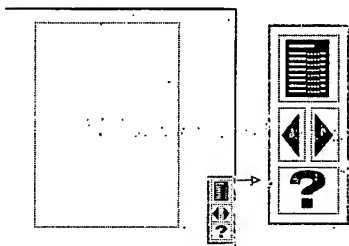
### Preparing areas for becoming active

A reader navigates through a hypertext system by clicking active areas—areas containing hypertext commands—or by scrolling up or down. An active area can be a range of text, a graphic, or a part of a graphic. You can set up active areas on body pages, or you can set them up on master pages so they appear in the same location on all body pages. For example, you can set up navigational buttons on master pages. When a reader clicks on an active area, the area's hypertext command is executed.

Before you insert a hypertext command, you prepare the area. For example, you can prepare a range of text by making it visually different from surrounding text.

Instruments included in the brass instruments family are the trombone, trumpet, French horn, tuba, cornet, and bugle. Not only do they attract attention with the exciting sounds they generate, but one is often

*Underlined text on body page can be active.*



*Graphics on master pages can be active.*


### Preparing text areas

A text area can be a word, a phrase, or an entire paragraph. If your reader clicks in a text area that contains a hypertext command, FrameMaker finds the hypertext command, highlights the area, and performs the command.

### **T** prepare a text area:

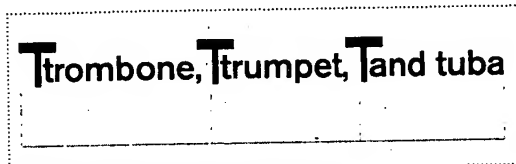
Do one of the following:

- To designate a word or a phrase as an active area, select the text and change its character format. Changing the character format defines the boundaries of the text area. Most formatting differences are recognized. Only pair kerning, spread, stretch, change bars, language, and case are ignored.

 *To designate a word or phrase as an active area without changing its appearance, use a character format that sets all properties to As Is (see “Using As Is” on page 92 and “Applying predefined formats to text” on page 88).*

- To designate an entire paragraph as an active area, make sure the paragraph contains no character format changes. As long as the paragraph contains only one hypertext command and no character format changes, FrameMaker highlights the entire paragraph and performs the command when a reader clicks anywhere in the paragraph.

- To designate several adjacent words or phrases in a text string as active areas, use the same character format for the entire text string. Then insert the various hypertext commands. FrameMaker divides the text into active areas based on the locations of the markers. When a reader clicks in the text, FrameMaker determines which active area was clicked and executes the correct hypertext command.



Markers divide text into active areas.

### Preparing graphics

Graphics often provide visual cues for hypertext actions. For example, readers can click an icon to display information on a topic, or an arrow to display the next page.

An active area over a graphic can contain a hypertext command that jumps to another location or one that divides the graphic into a matrix of hypertext commands.

*Note: If you're preparing documents for distribution in HTML format, you can use active areas over anchored graphics to create imagemaps. Unanchored graphics on master and body pages won't be converted to HTML.*

### T prepare a graphic:

1 Draw a text frame that covers the entire graphic you want to make active. Later, you'll place a hypertext command in the text frame. (When the reader clicks an active text frame, FrameMaker will highlight the entire frame.) For information on using the Text Frame tool to draw a frame, see "Using text with graphics" on page 218.

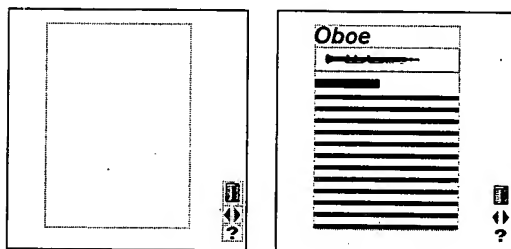
Make sure that the graphic is not set to have text run around it (see "Running text around graphics" on page 222).

2 Set the text frame's fill and pen patterns to None (see "Applying and changing drawing properties" on page 213). This makes the text frame transparent so that readers see the graphic behind the frame.

3 Choose Graphics > Bring to Front to place the text frame in front of the graphic, if it isn't already there. (Unless you placed the graphic on the page after drawing the text frame, the text frame will already be in front of the graphic.)

## Preparing the same area on multiple pages

You can create an area that appears in the same location on more than one page. You do this by setting up the area on a master page and inserting the hypertext command there. For example, you can create buttons on master pages that readers can click on body pages to display the next or previous page.



*Navigation buttons on master page appear on body pages.*

You can override active master page graphics on individual body pages if you want to send the reader somewhere else. For example, you can create a Next Page button with an override on the last body page of each document because there is no next page to display.

### To have an active area appear on more than one page:

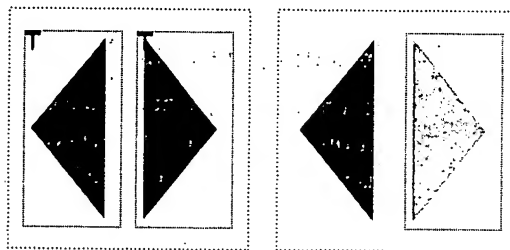
Set up the area on a master page rather than on a body page (see “Preparing text areas” on page 423 and “Preparing graphics” on page 424). The active area appears in the background of corresponding body pages. When your reader clicks that area on a body page, the hypertext command on the master page is activated.

When you draw the text frame on a master page, FrameMaker asks whether you want to create a template frame or a background frame. Text frames for active areas should be background (untagged) text frames.

### To override a master page command on an individual body page:

Do one of the following:

- Put a graphic or a different hypertext command over the area on the body page. For example, you can create an inactive, shaded button covering the Next Page button on the last body page of each document.



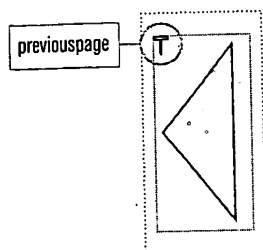
*Master page commands can be overridden by graphics on body pages.*

- Place a text frame that contains its own hypertext command over the graphic on the body page.

## Inserting hypertext commands

You use a marker to insert a hypertext command in a prepared area. After you insert a command and save the document in View Only format, the area becomes active. When a reader clicks an active area, FrameMaker highlights the area and executes the command.

Hypertext commands let your readers navigate through the view-only documents. If you're distributing the documents in View Only format, hypertext commands can also display alerts, close documents, exit FrameMaker, and start other applications.



Hypertext command marker

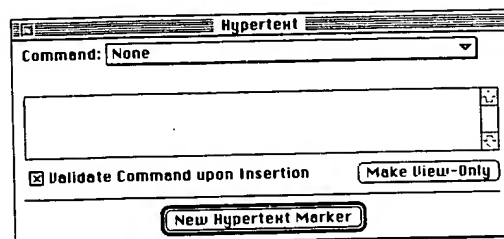
After inserting a hypertext command, you can test the command without saving the document in View Only format (see “Working in view-only documents and books” on page 447).

**Note:** To insert a hypertext command in a text inset, insert the command in the text inset's source document.

#### To insert a hypertext command:

- 1 Click in a prepared area where you want to insert a hypertext command. (For details, see “Preparing areas for becoming active” on page 422.) You can insert hypertext commands in text frames but not in text lines (graphic objects created with the Text Line drawing tool). Later text editing will be easier if your marker is at the beginning or end of a word.

- 2 Choose Special > Hypertext.



- 3 Choose a hypertext command from the Command pop-up menu. The syntax for the command appears below the pop-up menu, and the command name appears in the text box. (For a description of the items in the Command pop-up menu, see “Hypertext commands” on page 427.)

- 4 Enter parameters in the text box as needed (for example, a filename and linkname). For details, see “Creating hypertext links” on page 431 and the sections that follow it.

Hypertext commands must always appear in lowercase. The parameters can be uppercase or lowercase, but they are case-sensitive. The entire command can be up to 255 characters long. (Each character in a Japanese font counts as two characters.)

**Note:** If you enter a filename parameter for a file that isn't in the same folder as the current document, you must specify a path to the document (see “About pathnames in commands” on page 429).

- 5 If you want FrameMaker to validate the command when you insert it, select Validate Command upon Insertion.

6 Click New Hypertext Marker. FrameMaker checks the syntax in the text box. If Validate Command upon Insertion is selected, FrameMaker also validates the command. For example, FrameMaker validates a Jump to Named Destination command by verifying that the destination link exists in the specified document.

If FrameMaker finds an error, an alert message describes it, but the command is still inserted in a marker of type Hypertext. A marker symbol (T) appears at the insertion point when text symbols are visible.

#### **To edit a hypertext command:**


1 If the document is in View Only format, do one of the following to change it to Document format:

- If the Hypertext dialog box is open, click Make Editable.

- Press Esc Shift+f1 (lowercase L) k.

2 Choose Special > Hypertext if the Hypertext dialog box isn't open.

3 Select the marker that contains the command you want to edit. To select a marker in an otherwise empty text frame, double-click anywhere in the frame. You can also use the Find command to find and select hypertext markers. The hypertext command appears in the Hypertext dialog box.

 *If no other markers appear near the marker you want to edit, drag through the marker to display its hypertext command in the Hypertext dialog box.*

4 Edit the command in the text box and click Edit Hypertext Marker. Even if text around the marker is selected, only the command in the marker is affected.

5 If you want to return the document to View Only format, do one of the following:

- Click Make View Only in the Hypertext dialog box.

- Press Esc Shift+f1 (lowercase L) k.

#### **To delete a hypertext command:**

Select the marker that contains the command and press Delete. To select a marker in an otherwise empty text frame, double-click anywhere in the frame. You can also use the Find command to find and select hypertext markers.

#### **Hypertext commands**

FrameMaker supports the following hypertext commands. For a full description of each command and its syntax, see the cross-referenced information.

**Alert** Displays an alert box (see "Creating alert messages" on page 438).

**Alert with Title** Displays an alert box with a user-defined title (see "Creating alert messages" on page 438). On the Macintosh, the alert message appears without a title.

**Specify Named Destination** Marks the location that will be displayed when either a Jump to Named Destination or an Open Document command is executed (see "Creating links to specific topics" on page 431).

**Jump to Named Destination** Displays the location in the current or a different document that contains a corresponding destination link (see “Creating links to specific topics” on page 431). The page is displayed in the active window.

**Jump to Named Destination & Fit to Page** Displays the location in the current or a different document that contains a corresponding destination link and then resizes the window to fit the document page displayed (see “Creating links to specific topics” on page 431).

**Jump to First Page** Displays the first page of the current or a different document (see “Creating links to pages” on page 432). The page is displayed in the active window.

**Jump to Last Page** Displays the last page of the current or a different document (see “Creating links to pages” on page 432). The page is displayed in the active window.

**Go to URL** Launches browser and displays the specified Web page (see “Creating links to Web pages” on page 433).

**Jump to Page Number** Displays a specific page in the current or a different document (see “Creating links to pages” on page 432). The page is displayed in the active window.

**Jump to Previous Page** Displays the previous page of the current document (see “Creating links to pages” on page 432). The page is displayed in the active window.

**Jump to Next Page** Displays the next page of the current document (see “Creating links to pages” on page 432). The page is displayed in the active window.

**Jump Back** Displays the last location the reader viewed (see “Creating a way to retrace steps” on page 434). The page is displayed in the active window.

**Jump Back & Fit to Page** Displays the last location the reader viewed and then resizes the window to fit the document page displayed (see “Creating a way to retrace steps” on page 434).

**Open Document** Displays the page that contains the corresponding Specify Named Destination command (see “Creating links to specific topics” on page 431). In Windows and on the Macintosh, the page appears in a new window (leaving the active window open) only if the page is in a different document. On UNIX systems, the page always appears in a different window.

**Open Document & Fit to Page** Displays the page that contains the corresponding Specify Named Destination command and then resizes the new window to fit the document page displayed (see “Creating links to specific topics” on page 431). In Windows and on the Macintosh, the page appears in a new window (leaving the active window open) only if the page is in a different document. On UNIX systems, the page always appears in a different window.



**Open Document as New** Opens a document as a new, unnamed document (see “Creating links to new documents” on page 433). The document is displayed in a new window, leaving the active window open.

**Open Document at First/Last Page** Displays the first or last page (see “Creating links to pages” on page 432). In Windows and on the Macintosh, the page appears in a new window (leaving the active window open) only if the page is in a different document. On UNIX systems, the page always appears in a different window.

**Open Document at Page Number** Displays a specific page (see “Creating links to pages” on page 432). In Windows and on the Macintosh, the page appears in a new window (leaving the active window open) only if the page is in a different document. On UNIX systems, the page always appears in a different window.

**Popup Menu** Displays a pop-up menu of items, each containing a hypertext command (see “Creating pop-up menus” on page 436).

**Button Matrix** Allows the user to choose from a matrix of items that execute hypertext commands (see “Creating button matrices” on page 435).

**Message Client** Communicates with other applications (see “Creating ways to start or open” on page 439). Also creates a link to a URL (Universal Resource Locator) on the World Wide Web or an intranet for use in documents that are later converted to HTML (see “Setting up links to URLs” on page 459).

**Close current window** Removes the active window from the screen (see “Creating ways to close or exit” on page 441).

**Close All Hypertext Windows** Removes all view-only windows from the screen (see “Creating ways to close or exit” on page 441).

**Exit Application** Exits the FrameMaker application (see “Creating ways to close or exit” on page 441).

## About pathnames in commands

Many hypertext commands can contain a pathname. In a pathname, folder levels are separated by a slash (/), even in Windows and on the Macintosh. On UNIX systems, the pathname can include environment variables, such as \$HOME, to indicate the reader's home directory.

If your hypertext documents will be used on several platforms, use filenames that are valid on all the platforms. For information on filenaming requirements on different platforms, see the online manual *Working on Multiple Platforms*.

**Note:** A hypertext command that contains a single-character filename may not work.

**Relative pathnames** FrameMaker searches for a relative pathname beginning in the folder that contains the current document. To go up one folder level, use two periods (..). For example, suppose a hypertext command refers to a document named Trombone that is stored in a folder named Brass. If the Brass folder is in the same folder as the current document, use the pathname

**HYPERTEXT COMMANDS IN HTML AND PDF DOCUMENTS** When you convert a document to HTML or PDF, some FrameMaker hypertext commands work in the converted files in the same way that they work in view-only FrameMaker documents, while others do not. The differences are described in the following table.

Command	PDF	HTML
Alert, Alert with Title	Appears as a note, with no title	Does not work
Jump to Named Destination	Works as described in this chapter	Works as described in this chapter
Jump to Named Destination & Fit to Page	Works as described in this chapter, but doesn't fit to page	Works as described in this chapter, but doesn't fit to page
Jump to First Page, Jump to Last Page, Jump to Page Number, Jump to Previous Page, Jump to Next Page	Works as described in this chapter	Does not work
Jump Back, Jump Back & Fit to Page	Does not work	Does not work
Open Document	Works as described in this chapter	Works as described in this chapter
Open Document & Fit to Page, Open Document as New, Open Document at First Page, Open Document at Last Page, Open Document at Page Number	Works as described in this chapter, but doesn't fit to page or open a separate window	Works as described in this chapter, but doesn't fit to page or open a separate window
Pop-up Menu	Does not work	Does not work
Button Matrix	Does not work	Works as described in this chapter, if the text frame containing the command is in an anchored frame in the main text flow
Message URL	Works when PDF is opened in browser; however, the link may not work in Acrobat	Works as described in this chapter
Message Client	Does not work	Does not work
Close current window, Close All Hypertext Windows, Exit Application	Does not work	Does not work

**Brass/Trombone.** If the Brass folder is at the same level as the folder that contains the current document, use ../Brass/Trombone.

**Absolute pathnames** FrameMaker searches for an absolute pathname beginning at the top of the file system. In Windows, the absolute pathname begins with the drive specifier, a colon, and a slash. On the Macintosh and on UNIX systems, an absolute pathname begins with a slash. In addition, on the Macintosh the pathname includes the drive name.

For example, suppose a hypertext command refers to a document named Trombone in a folder named Brass. In Windows, if the Brass folder is at the top level of drive E, use the pathname E:/Brass/Trombone. On the Macintosh, if the Brass folder is at the top level of the drive named MyDrive, use the pathname /MyDrive/Brass/Trombone. On UNIX systems, if the Brass folder is at the top of the file system, use the pathname /Brass/Trombone.

Absolute pathnames are not recognized across platforms, so you should always use relative pathnames if your hypertext documents will be viewed on multiple platforms.

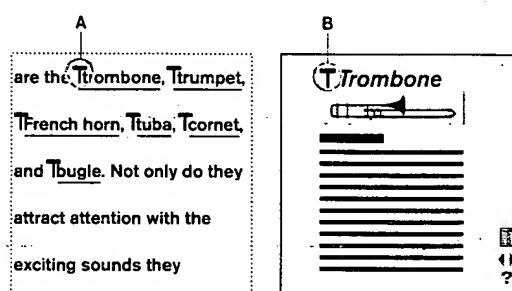
## Creating hypertext links

You can create links to information in different locations in the same document or in different documents. For example, you can create links that jump to specific topics or pages, and you can use FrameMaker cross-references as links. You can also allow your readers to retrace their jumps.

If your documents will be distributed in PDF or HTML format, some of the commands described in this section will not work. For details, see "Hypertext commands in HTML and PDF documents" on page 430.

## Creating links to specific topics

You can create a link from one location in a hypertext document to a topic in another location. You use one command to specify the topic you want to display, and you use another to mark the spot on the linked page.



A. Specify the topic to display. B. Mark the topic.

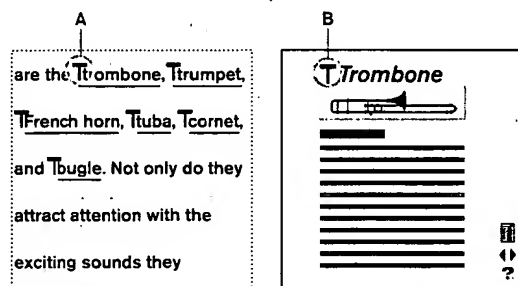
FrameMaker can display the linked information in the same window or in a new window (leaving the active window open).

### To identify a linked topic:

Follow the instructions in "Inserting hypertext commands" on page 425 to insert a Specify Named Destination command. This command uses the following syntax:

newlink *linkname*

In this example, *linkname* is a word or phrase that identifies the destination. A linkname with a trailing space differs from a linkname without a trailing space. Also, the linkname is case-sensitive; *French Horn* is not the same as *french horn*.



A. Jump to Named Destination command: `gotolink trombone`  
B. Specify Named Destination command: `newlink trombone`

**Note:** If you omit the Specify Named Destination command, the Jump to Named Destination and Open Document commands do nothing when clicked unless they refer to a filename. In that case, the other file will open, showing the first page.

#### To create a link to a specific topic:

Follow the instructions in “Inserting hypertext commands” on page 425 to insert one of the following hypertext commands:


- To display the linked information in the same window, insert a Jump to Named Destination command. This command uses the following syntax:

`gotolink filename:linkname`

- To display the linked information in a different window, insert an Open Document command. (In Windows and on the Macintosh, the information appears in a new window only if it’s in a different document.) This command uses the following syntax:


`openlink filename:linkname`

In this example, *filename* is the name of the document you want to display, and *linkname* is the descriptive word or phrase that you used in the corresponding Specify Named Destination command.

 If the linked information is in a document whose page size differs from the current document’s, you can display the information in a window that is resized to fit the page. To do this, use the Jump to Named Destination & Fit to Page command or the Open Document & Fit to Page command.

#### Creating links to pages

You can create a link to the first, last, previous, or next page in the same document or in a different document. You can also create a link to a specific page number.

 You can create navigation aids for your readers by creating links to the next and previous pages on the master pages of a document.

#### To create a link to a page:

Follow the instructions in “Inserting hypertext commands” on page 425 to insert one of the following hypertext commands:

- To display the linked page in the same window, insert a Jump to Page Number, Jump to First Page, or Jump to Last Page command. The commands use the following syntax:

```
gotopage filename:pagenumber
gotopage filename:firstpage
gotopage filename:lastpage
```

- To display the linked page in a different window, insert an Open Document at Page Number, Open Document at First Page, or Open Document at Last Page command. (In Windows and on the Macintosh, the page appears in a new window only if the page is in a different document.) These commands use the following syntax:

```
openpage filename:pagenumber
openpage filename:firstpage
openpage filename:lastpage
```

**Note:** When you insert a hypertext command to display a specific page number, use the actual page number in the document. For example, if the destination document *MyDoc* uses Roman numerals for page numbers and begins on page v, the command to display the third page would be *openpage MyDoc:vii*.

- To display the next or previous page of the current document, insert a Jump to Previous Page or Jump to Next Page command. (If the first page of the document is already displayed, Jump to Previous Page has no effect; if the last page of the document is displayed, Jump to Next Page has no effect.) These commands use the following syntax:

```
previouspage
nextpage
```

*filename* is the name of the document you want to display, and *pagenumber* is the number of the page you want to display. When the page you want to display is in the current document, don't include the filename and colon. The following table contains examples of the commands.

Command	Effect
gotopage 8	Displays, in the same window, page 8 of the current document
openpage Trombone:8	Displays, in a different window, page 8 of the document Trombone in the current folder

## Creating links to new documents

You can create a link to another document and have FrameMaker open the document in another window as a new, unnamed document. For example, you can create an online system for your site's document templates.

### To create a link to a new document:

Follow the instructions in "Inserting hypertext commands" on page 425 to insert an Open Document as New command. This command uses the following syntax:

```
opennew filename
```

*filename* is the name of the document you want to use as a template.

## Creating links to Web pages

You can create a link to a Web page on the Internet or a company intranet.

**To create a link to a Web page:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert a Go to URL command. This command uses the following syntax:

message URL *address*

*address* is the name of the URL you want to jump to, such as <http://www.adobe.com>.

**Creating links using cross-references**

You use FrameMaker cross-references as hypertext links. When the reader clicks a cross-reference in a view-only document, FrameMaker jumps to the source information. If a cross-reference is present in the same text area as a hypertext command, the cross-reference takes precedence over the hypertext command.

You can use MIF to specify that cross-references should not be active in your hypertext document. You can also specify that clicking an active cross-reference always causes FrameMaker to open a new window. For information on using MIF to customize hypertext documents, see the online manual *MIF Reference*.

**Highlighting markers in view-only documents**

When you click an active area in a view-only document, FrameMaker doesn't usually select the cross-reference marker or the hypertext marker that identifies the linked information. (If the document is in FrameMaker Document format, the marker is selected.) You can use MIF to specify that the markers should be selected. For information on using MIF to customize hypertext documents, see the online manual *MIF Reference*.

**Creating a way to retrace steps**


You can create hypertext commands that allow readers to retrace the links they followed in a document window. (FrameMaker maintains a stack of the last 255 links in each window.) For example, you might use these commands on master pages to create a navigation aid that lets readers retrace their steps (for example, a “Go Back” button).

**To create a way to retrace steps:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert a Jump Back command. This command uses the following syntax:

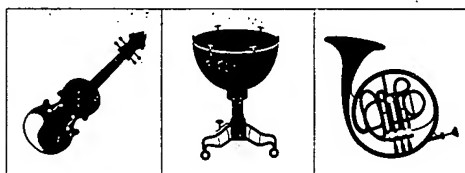
previouslink *filename:linkname*

*filename* and *linkname* define the location FrameMaker should display when the stack is empty. If the stack is empty and if you haven't provided a *filename* and *linkname*, FrameMaker leaves the current page displayed.

 *If the linked information is in a document whose page size differs from the current document's, you can display the information in a window that is resized to fit the page. To do this, use the Jump Back & Fit to Page command.*

## Creating button matrices

You can create a button matrix of equal-sized cells that correspond to hypertext commands. When a reader clicks a cell in a hypertext document, FrameMaker highlights the cell and executes the corresponding hypertext command. For example, the button matrix could be a group of musical instruments.



*A button matrix with three cells*

If the reader clicks one of the instruments, FrameMaker highlights the area around the instrument and executes the corresponding hypertext command.

### **T** create a button matrix:

- 1 Put the graphic in your document. The graphic should be appropriate for setting up as a matrix of equal-sized cells.
- 2 Prepare the graphic to be an active area by drawing a single text frame around the entire graphic (see "Preparing graphics" on page 424).
- 3 Click in the text frame to place the insertion point.
- 4 Follow the instructions in "Inserting hypertext commands" on page 425 to insert a Button Matrix command in the text frame (leaving the frame otherwise empty). This command uses the following syntax:

`matrix rows columns flowname`

*rows* and *columns* are the numbers of rows and columns in the matrix, and *flowname* is the flow tag of a text frame you'll create on a reference page. The flowname cannot contain embedded spaces.

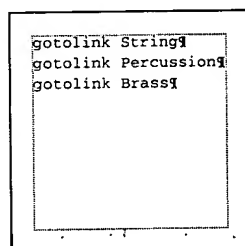
For the example shown earlier, with two rows and three columns, and with the corresponding hypertext commands in a reference page text frame whose flow tag is `InstrumentTypes`, the command would be as follows:

`matrix 1 3 InstrumentTypes`

- 5 Draw a text frame on a reference page and assign a flow tag that matches the flowname in the Button Matrix command. For information on using the Text Frame tool to draw a text frame, see "Using text with graphics" on page 218. For information on assigning flow tags, see "Controlling the flow of text" on page 297.

6 Click in the text frame to place the insertion point, and then type one hypertext command in each paragraph in the text frame. The commands should correspond to the items in the first row of the matrix, from left to right, followed by the second row, and so on. Each command must fit on one line. You can resize the text frame if necessary.

The following illustration shows possible contents of the text frame for the example discussed at the beginning of this section.

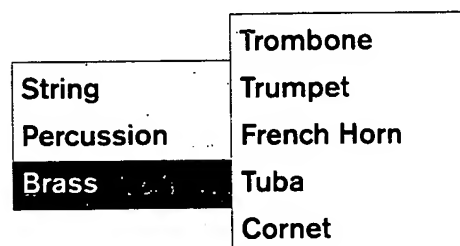


Text frame on reference page.

**Note:** You can use the Hypertext dialog box as an aid in identifying the syntax of the commands you need to type, but type the commands directly in the text frame. Don't use the Hypertext dialog box to insert a hypertext marker.

## Creating pop-up menus

Your hypertext document can display a pop-up menu from which readers can choose an item that links to related information. The pop-up menu can, in turn, contain one level of submenus.



Hypertext pop-up menu and submenu

### To create a pop-up menu of hypertext commands:

- 1 Create the graphic button that the reader will click to display the pop-up menu.
- 2 Prepare the graphic to be an active area by drawing a single text frame around the entire graphic (see "Preparing graphics" on page 424).
- 3 Follow the instructions in "Inserting hypertext commands" on page 425 to insert a Popup Menu command in the text frame (leaving the frame otherwise empty). This command uses the following syntax:

popup *flowname*

*flowname* is the flow tag of a text frame you'll create on a reference page. The flowname cannot contain embedded spaces.



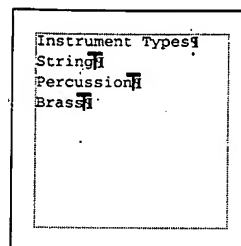
4 Draw a text frame on a reference page and assign a flow tag that matches the flowname in the Popup Menu command. For information on using the Text Frame tool to draw a text frame, see “Using text with graphics” on page 218. For information on assigning flow tags, see “Controlling the flow of text” on page 297.

5 Click in the text frame to place the insertion point, type the menu name in the flow, and press Return. (The first item in the text frame will always be considered as the title of the pop-up menu.) The menu name appears on UNIX systems, but not in Windows or on Macintosh systems.

6 Type a menu item in each subsequent paragraph. The contents of each paragraph will appear as a command in the pop-up menu. If necessary, widen the text frame so that each item fits on a single line.

7 Follow the instructions in “Creating hypertext links” on page 431 to insert a hypertext command in each line except the line that contains the menu name. For example, you can use a Jump to Named Destination command to display related information, an Alert command to provide a short message to your readers, or a Popup Menu command to display a submenu of items.

The text frame for the pop-up menu described at the beginning of this section might look like the following.



*Text frame for sample hypertext pop-up menu*

**Note:** You won't be able to open the pop-up menu until you insert at least one hypertext marker on the reference page.

**To create a pop-up submenu of hypertext commands:**

1 Locate the text frame on the reference page that describes the pop-up menu for which you want to create a submenu.

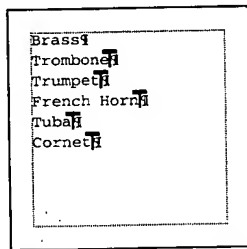
2 Follow the instructions in “Inserting hypertext commands” on page 425 to insert a Popup Menu command in the line for which you want the submenu to appear. This command uses the following syntax:

*popup flowname*

*flowname* is the flow tag of a text frame you'll create on a reference page. The flowname cannot contain embedded spaces.

- 3 Create the submenu by following steps 4 through 7 in “To create a pop-up menu of hypertext commands:” on page 436. However, you can’t use a Pop-up Menu command in the submenu, because you can’t create a submenu within a submenu.

The text frame for the submenu shown at the beginning of this section would have a flow tag of *Seals*. It might look like the following.



Text frame for sample hypertext pop-up submenu

## Creating alert messages

You can create a hypertext command to display an alert box that contains a title (in Windows and on UNIX systems) and a message. If you don’t specify a title in the command, the alert box contains the default title *FrameMaker—Alert*.

In Windows and on UNIX systems, you can also specify a default title for all hypertext alert boxes in a document.

### To create an alert message:

Follow the instructions in “Inserting hypertext commands” on page 425 to insert one of the following hypertext commands:

- To display a hypertext alert box with the default title, insert an Alert command. This command uses the following syntax:

alert *message*

- In Windows and on UNIX systems, to display an alert box with a title other than the default, insert an Alert with Title command. This command uses the following syntax:

alerttitle *title:message*

*title* is the title of the alert box and *message* is the text you want to display in the alert box. The total number of characters in *title* and *message* cannot exceed 243 characters. (Each character in a Japanese font counts as two characters.)

For example, the following command displays an alert box whose title is *Unavailable* and whose alert message is *This document is currently under construction*.

alerttitle Unavailable:This document is currently under construction

### To specify a default title for alerts in a document (Windows and UNIX):

- 1 Draw a text frame on a reference page and assign the frame a flow tag of *AlertTitle*. For information on using the Text Frame tool to draw a text frame, see “Using text with graphics” on page 218. For information on assigning flow tags, see “Controlling the flow of text” on page 297.

- 2 Type the default title in the text frame. For example, if *Not Available Online* appears in the flow, that title, not *FrameMaker—Alert*, will appear in the title bar of any alert box created with the Alert command.

The default title will also appear in the title bar of any alert box created with the Alert with Title command in the following form, without a title:

```
alerttitle :message
```

## Creating ways to start or open

You can use hypertext commands to start other applications. For example, a reader can start a database application from a view-only document to retrieve and display data.

You can also use hypertext commands to accomplish the following platform-specific tasks:

- On the Macintosh, if AppleScript software is installed on your system, you can start an AppleScript script. For example, a reader can start a script that modifies a document or opens a spreadsheet to display data. For information on AppleScript, see the online manual *Using AppleScript* and the documentation that came with your AppleScript software.
- On UNIX systems, you can execute UNIX commands. For example, a reader can click an active area to remove backup files. You can also send messages to FrameMaker clients by using the Application Program Interface (API). For details, see the *FDK Programmer's Guide*, which is included in the Frame Developer's Kit™.

In addition, you can create hypertext commands that link to a Universal Resource Locator (URL) when the document is converted to Hypertext Markup Language (HTML). For information, see "Creating links to Web pages" on page 433.

### To create a way to start another application in Windows:

Follow the instructions in "Inserting hypertext commands" on page 425 to insert a Message Client. This command uses the following syntax:

```
message system application path,windowstate
message winexec application path,windowstate
```

*application* is the application filename, *path* is an optional command-line parameter, and *windowstate* specifies the state of the window that is opened. The possible *windowstate* values are as follows.

State	Meaning
SW_HIDE	Hides the window and activates another window
SW_MAXIMIZE	Maximizes the specified window
SW_MINIMIZE	Minimizes the specified window and activates the next window in the Alt+Tab order
SW_RESTORE	Activates and displays the window (If the window is minimized or maximized, Windows restores it to its original size and position.)
SW_SHOW	Activates the window and displays it in its current size and position
SW_SHOWDEFAULT	Sets the show state based on the SW_ flag specified in the STARTUPINFO structure passed to the CreateProcess function by the program that started the application
SW_SHOWMAXIMIZED	Activates the window and displays it as a maximized window

State	Meaning
SW_SHOWMINIMIZED	Activates the window and displays it as a minimized window
SW_SHOWMINNOACTIVE	Displays the window as a minimized window (The active window remains active.)
SW_SHOWNA	Displays the window in its current state (The active window remains active.)
SW_SHOWNOACTIVATE	Displays a window in its most recent size and position (The active window remains active.)
SW_SHOWNORMAL	Activates and displays a window (If the window is minimized or maximized, Windows restores it to its original size and position.)

If you omit the *windowstate* value, the window state is set to SW\_SHOWNORMAL. For more information on window states, see the documentation for the Windows software development kit.

For example, to start PaintBrush and open the Ship.pcx file on drive C in a minimized window, you would use the following command:

```
message system pbrush.exe C:/Ship.pcx,
SW_MINIMIZE
```

For an explanation of the use of the forward slash rather than the backslash, see “About pathnames in commands” on page 429.

**To create a way to open a file or another application:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert a Message Client command. This command uses the following syntax:

```
message openfile pathname
```

*pathname* is the path to the file, application, or AppleScript script.

For example, to start the application that created the Tuba.eps file (located in the Graphics folder on the drive named HardDrive) and to open the file, use the following command:

```
message openfile /HardDrive/Graphics/Tuba.eps
```

To run the DocReport script (located in the Scripts folder on the drive named HardDrive), use the following command:

```
message openfile /HardDrive/Scripts/DocReport
```

For an explanation of the use of the forward slash in pathnames, see “About pathnames in commands” on page 429.

**To create a way to execute commands on UNIX systems:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert a Message Client command. This command uses the following syntax:

```
message system command
```

*command* is the text of any UNIX command you can type in a UNIX window.

For example, the following command lists the contents of the folder in which the document resides when the reader clicks an active area that contains the command

```
message system ls ~
```

In this example, FrameMaker passes the command to `sh(1)` for execution; `stdout` and `stderr` are redirected to your UNIX window. FrameMaker waits for the command, script, or program to finish before continuing.



*You can use the environment variables `FMDOCDIR` and `FMDOCNAME` with the message system command. When the reader clicks an active area that contains the command, `FMDOCDIR` is set to the folder that contains the current document and `FMDOCNAME` is set to the name of the current document.*

**To create a way to send messages to an application that is already running on UNIX systems:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert a Message Client command. This command uses the following syntax:

*message application parameters*

*application* is the name of the application, and *parameters* are any parameters to be passed to the application. For example, the following command causes an API client named `ProductionCheck` to process all files in the `Guide` folder:

`message ProductionCheck Guide/*`

## Creating ways to close or exit

The hypertext commands for closing files and exiting FrameMaker work in the same way as the commands on the File menu.

If a reader executes a command to close a file that contains unsaved changes, FrameMaker prompts the reader to save the document before closing.

**To create a way to close documents:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert one of the following hypertext commands:

- To create a way to close the current view-only document, insert a Close active window command. This command uses the following syntax:

`quit`

- To create a way to close all open view-only documents, insert a Close All Hypertext Windows command. In Windows and on UNIX systems, the Close All Hypertext Windows command also closes view-only documents that have already been closed to an icon. This command uses the following syntax:

`quitall`

**To create a way to exit FrameMaker:**

Follow the instructions in “Inserting hypertext commands” on page 425 to insert an Exit command. This command uses the following syntax:

`exit`

## Testing and troubleshooting hypertext documents

After writing the document and inserting hypertext commands, test the commands. To speed up your testing of hypertext commands, you can execute commands without first changing a document to View Only format and you can force the destination of a hypertext jump to appear in a separate window.

You can also have FrameMaker validate all the commands in a document.

**Note:** On UNIX systems, to switch several documents at a time between View Only format and Document format, use *fmbatch* (see “Starting *fmbatch*” on page 537).

### To execute a hypertext command without changing the document to View Only format:

Do one of the following:

- (Windows) Control-Alt-click an active area.
- (Macintosh) Control-Option-click an active area.
- (UNIX) Control-right-click an active area.

FrameMaker executes the hypertext command as if the document were view-only.

### To force the linked destination to appear in a different window:

Do one of the following:

- (Windows) If the document is view-only, Shift-click an active area. Otherwise, Control-Alt-Shift-click an active area.

- (Macintosh) If the document is view-only, Shift-click an active area. Otherwise, Shift-Control-Option-click an active area.

- (UNIX) If the document is view-only, Shift-click an active area. Otherwise, Shift-Control-right-click an active area.

### To validate all the commands in one or more documents:

- 1 Make the appropriate document window or book window active. If a book window is active, select the documents you want to affect.
- 2 Press Esc v h. FrameMaker checks each hypertext command. For example, if a command refers to another document, FrameMaker attempts to open the document; and if the command refers to a named destination, FrameMaker verifies that the destination exists. If any problems are found, an alert message describes the first error in the document. In a book, all errors are written in the Book Error Log.

## Generating a list or index of hypertext markers

You can quickly check the text of hypertext commands by generating a list or index of hypertext markers. The generated list will contain the text of all hypertext markers inserted on body pages and their page numbers.

**To generate a list or index of markers:**

Use the Special > List of > Markers or Special > Index of > Markers command. For information on generating from a document, see “Generating TOCs and other lists” on page 326 and “Generating indexes” on page 336. For information on generating from a book, see “Adding files to books” on page 363 and “Updating books” on page 372.

**Troubleshooting hypertext documents**

Errors in hypertext commands or in their placement in the document, or formatting errors in active areas can cause problems with the behavior of the commands. For example, an incorrect linkname will prevent a hypertext command from being executed correctly.

This section describes some common hypertext problems and possible solutions.

**Clicking an active area has no effect** Check for the following possible problems:

- The document might not be in View Only format.
- If the active area is highlighted correctly when you click, a command may contain a linkname that doesn't match the corresponding link at the destination.
- If the active area isn't highlighted when you click, the marker that contains the hypertext command may not be of type Hypertext.
- If the active area is over a graphic, the text frame containing the hypertext marker may not be in front of the graphic.

**The jump goes to the wrong page** The command may contain a correct filename but an incorrect linkname or an invalid page number.

**Only part of the active area is highlighted** Check for the following possible problems:

- If you're trying to make a range of text active, the text may contain an extra hypertext marker or the character format may change within the range of text.
- If you're trying to make an entire empty text frame active, the frame may contain an extra empty paragraph, or extra characters or markers.

**Items are missing from a pop-up menu** The hypertext commands for missing menu items are incorrect. If the pop-up menu does not appear, no commands are correct.

**Adding hypertext links to generated files**


When you generate an index or a list such as a table of contents, FrameMaker can insert hypertext links in the generated file. These links can greatly enhance the usefulness of an online index or table of contents. When you click a topic or page number in the generated file, the appropriate page in the linked document is displayed.

You can use generated hypertext documents for the following purposes:

- To distribute a generated table of contents or index in View Only format as a navigation tool for your online documents.

- To debug documents. (For example, when creating an index, you can generate the index with hypertext links and then quickly fix index marker errors by jumping to the exact locations of the markers.)

Generating a list of hypertext markers produces a list of markers drawn only from body pages. Hypertext markers on master pages are not included.

 You can activate the hypertext commands in a generated document without changing the document to View Only format (see “Testing and troubleshooting hypertext documents” on page 442).

#### To add hypertext links to a generated file:

Do one of the following:

- From an individual FrameMaker document, select Create Hypertext Links when you use the File > Utilities > Compare Documents command.

For more information, see “Comparing document versions” on page 394.

- When adding a generated file to a book, turn on Create Hypertext Links in the Set Up dialog box. If the generated file has already been created, select the generated file in the book window and choose the appropriate Set Up command from the Edit menu (such as Set Up Table of Contents).

For complete information on generating lists and indexes, see “Generating TOCs and other lists” on page 326 and “Generating indexes” on page 336.

## Adding linked thumbtabs to indexes

You can make a generated online index easier to navigate by adding thumbtabs. Readers click on a thumbtab letter to display the page in the index that contains entries starting with that letter.

#### To add thumbtabs to a generated index:

- 1 Generate the index with hypertext links, in the way described in the preceding section.
- 2 In the index, choose View > Master pages.
- 3 On a master page, use the Text Line tool to create the thumbtab letters and then draw a text frame over each thumbtab letter (see “Using text with graphics” on page 218).
- 4 Insert a Jump to Named Destination command in the text frame for each thumbtab letter (see “Creating links to specific topics” on page 431). For example, in the text frame over the thumbtab letter A, insert a Jump to Named Destination command with the syntax *gotolink A*. (Each group title in the index already contains a corresponding Specify Named Destination command as a result of generating the index with hypertext links.)  
  
If the index contains a collapsed group title, such as *P–R*, insert a Jump to Named Destination command with the same syntax for each of the thumbtab letters in the range. For example, insert *gotolink P–R* in the three text frames for *P*, *Q*, and *R*.
- 5 If the index uses more than one master page, copy the thumbtabs to the other master pages.
- 6 Save the index in View Only format.



## Controlling how source documents are displayed

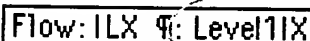
When you click an active area in a generated hypertext document, FrameMaker opens a new window and displays the correct page in the linked document. The linked marker or paragraph is highlighted and centered in the window. You can change the display of the linked document—for example, to display the document in the active window.

### To control how a linked document is displayed:

1 Generate the hypertext document (see “Adding hypertext links to generated files” on page 443).

2 In the generated file, choose View > Reference Pages and display the reference page that contains the special flow for the generated file.

The flow tag of the special flow is the same as the document’s suffix. For example, the special flow for a table of contents is tagged TOC, and the special flow for an index is tagged IX. To determine a flow’s tag, click in the text frame and look in the Tag area of the status bar.



Flow: ILX 9: Level1IX

3 In the special flow, find the paragraph that controls how the linked document is displayed.

In a table of contents, the paragraph’s tag is ActiveTOC; in an index, it’s named ActiveIX. The paragraph will look something like this:

```
openObjectId <$relfilename>:<$ObjectType>  
<$ObjectId>
```

To determine a paragraph’s tag, click in the paragraph and look in the Tag area of the status bar.

4 Edit the paragraph so that it contains the display command you want.

For a list of the commands you can use, see “Display commands for generated documents” on page 446. In Windows and on UNIX systems, in addition to the commands in the list, you can use the Message Client command to send messages to applications that use the Application Program Interface (API). For details, see the *FDK Programmer’s Guide*, which is included in the Frame Developer’s Kit.

5 Save the generated file and then regenerate it.

**DISPLAY COMMANDS FOR GENERATED DOCUMENTS** When the reader clicks an active area in a generated hypertext document, FrameMaker displays the correct page in the linked document. The following table lists some of the hypertext commands you can use to control how the linked document is displayed. You should type the commands exactly as shown. Use the <\$relfilename> building block to create a relative pathname from the generated file to the linked document, and use <\$fullfilename> for a full pathname. (The following examples show only the <\$relfilename> building block.)

To display	Type
The linked marker or paragraph centered in the active window	gotoObjectId <\$relfilename>:<\$ObjectType> <\$ObjectId>
The linked marker or paragraph centered in the active window resized to fit the page	gotoObjectIdFitWin <\$relfilename>:<\$ObjectType> <\$ObjectId>
The linked marker or paragraph centered in a new window	openObjectId <\$relfilename>:<\$ObjectType> <\$ObjectId>
The linked marker or paragraph centered in a new window resized to fit the page	openObjectIdFitWin <\$relfilename>:<\$ObjectType> <\$ObjectId>
The page containing the linked marker or paragraph, with nothing highlighted, in the active window	gotopage <\$relfilename>:<\$pagenumonly>
The page containing the linked marker or paragraph, with nothing highlighted, in a new window	openpage <\$relfilename>:<\$pagenumonly>
An alert that displays the filename of the linked document	alert <\$relfilename>

### Overriding the generated file's display command

You can specify how a specific document is displayed, overriding the display command contained in the ActiveTOC or ActiveIX paragraph in the generated file. For example, you may want a generated index that references several files, including a glossary file, to display the glossary in one window and all the other files in another window.

#### To override the display command for a linked document:

1 Draw a text frame on a reference page in the linked document and assign the frame the flow tag HypertextLinks. For information on using the Text Frame tool to draw a text frame, see "Using text with graphics" on page 218. For information on assigning flow tags, see "Changing flow tags and Autoconnect" on page 298.

2 Do one of the following:

- To display the document in the same window, type **gotoObjectId**

- To display the document in a different window, type `openObjectId`

3 Save the document and regenerate (see “Generating TOCs and other lists” on page 326 and “Generating indexes” on page 336). When you click in the generated file, the linked document will be displayed using the command specified in the HypertextLinks flow, rather than using the command in the ActiveTOC or ActiveIX paragraph.


### Incorporating generated files into an online system

If you're using a generated hypertext document as a debugging tool, the document is ready to use when you generate it. If, however, the generated file is going to be part of a hypertext online system, you may want to do the following before distributing the documents to your readers in View Only format:

- Set up links from the documents back to the generated file. You can use any of the hypertext commands. For example, you can create an Index or Table of Contents button that jumps back to the generated file.
- Add active areas to the master pages of documents for navigating through the online system. For example, you can create buttons for paging forward and backward.
- Add links to other parts of the online system in the source documents and in generated files.


## Working in view-only documents and books

You distribute online documents and books in View Only format. Readers can view, search, copy, and print—but not edit—a view-only document or book using FrameMaker, FrameMaker+SGML, or FrameViewer.

 Readers will see the contents of a view-only document exactly as it appeared when you made it view-only. Before changing a document to View Only format, use the View menu to turn off the display of the grid, the ruler, text symbols, and borders. To display a view-only document without the menu bar or scroll bars, see the online manual MIF Reference.



### To save a document in View Only format:

- 1 Choose File > Save As.
- 2 Specify View Only format and click Save.

 To switch several documents at a time between View Only format and Document format, select the files in the book and press `Esc Shift+f1` (lowercase L) `k`. Choose the check box and click Continue.

### To save a book in View Only format:

- 1 In the book window, choose File > Save Book As.
- 2 Specify View Only format and click Save.

When a view-only book is open, you can click  and  to toggle between displaying filenames and text.

**To change a document to View Only format without saving it:**

Do one of the following:

- Choose Special > Hypertext and click Make View-Only.
- Press Esc Shift+f l (lowercase L) k. This keystroke also works for a book.

**To change a view-only document to Document format:**

Do one of the following:

- If the Hypertext dialog box is open, click Make Editable.
- Press Esc Shift+f l (lowercase L) k. This keystroke also works for a book.

*Note: On the Macintosh, to look at a locked, view-only document in FrameMaker, open it with the File > Open command, or drag the document onto the FrameMaker application icon. Double-clicking the icon of a document saved in View Only format may open the document in FrameViewer (if available), not FrameMaker.*

**To make a view-only book editable or an editable book view-only:**

- 1 In the book window, select any documents that you want to change from view-only to Document format.
- 2 Press Esc Shift+f l (lowercase L) k.
- 3 To make the selected files editable, click the check box. To make the selected files view-only, deselect the check box.
- 4 Click Continue.

## Navigating to specific pages

You can display pages in view-only documents by following links in the documents, by using controls in the document window, or by using menu commands.

**To navigate to specific pages in view-only documents:**

Do one of the following:

- Click any active area whose hypertext command jumps to a different location.
- Click the page buttons in the status bar.
- Use the scroll bar or the Page Up and Page Down keys.
- Use the commands on the Navigation menu.
- (Windows and UNIX) Right-click anywhere in the document window and choose a command from the context menu.
- (Macintosh) Hold down Control while pressing the mouse button anywhere in the document window, and choose Go Back from the context menu.

If you customized your view-only window environment as described in the online manual *MIF Reference*, some viewing methods may not be available.

## Jumping backward or forward

You can jump back to previous links and then jump forward again.

### To jump backward:

Do one of the following:

- Click an active area with a Jump Back or Jump Back & Fit to Page command.
- Choose Navigation > Go Back.
- (Windows and UNIX) Right-click anywhere in the document window and choose Go Back from the context menu.
- (Macintosh) Hold down Control while pressing the mouse button anywhere in the document window, and choose Go Back from the context menu.

### To jump forward:

Press Esc v Shift+n. You can jump forward only if you have previously jumped backward.

## Opening a new window

If a link is set to display a document in the active window, you can force FrameMaker to open a new window instead.

### To open a new window when following a link:

Shift-click an active area. In Windows and on the Macintosh, FrameMaker doesn't open a new window unless the link is to a different document.

## Using menu c mmands

Some FrameMaker commands are available in view-only documents. For example, you can copy text and graphics from a view-only document and paste them in an editable document, search for text and paragraph tags, and print.

View-only document windows use four FrameMaker menus: File, Edit, Navigation, and Windows. In order to use some menu commands, you have to place an insertion point. Other menu commands, such as Edit > Copy, require you to select items. View-only book windows use three FrameMaker menus: File, Edit, and Windows.

If you customized your view-only window environment, some commands may not be available. For information on disabling commands, see the online manual *MIF Reference*.

### To place the insertion point or to select an object in a view-only document:

Do one of the following:

- (Windows and UNIX) Control-click.
- (Macintosh) Command-click.

### To select in a view-only document:

Do one of the following:

- (Windows and UNIX) Hold down Control and select text as you would in an editable document.
- (Macintosh) Hold down Command and select text as you would in an editable document.

## Working with FluidView format

A document in FluidView™ format appears as one continuous page, without headers, footers, or margins. When you resize the document window, the text is reformatted to fit within the width of the new window.

In most cases, you work with FluidView documents just as you work with view-only documents. For example, you can click hypertext links to navigate within and between documents. A FluidView document differs from a view-only document in the following ways:

- Because the document appears on-screen as one continuous page, clicking the Page Up or Page Down button on the bottom of the document window displays the previous or next screenful of text instead of the previous or next page.
- The printed version of a FluidView document may not match what you see on the screen. You can use headers and footers, multiple columns, and other page layout options to optimize the printed appearance of the document.

### To change a document to FluidView format:

- 1 Click in the text flow that you want to display in FluidView format. Only one text flow in a document can appear in FluidView format at a time.
- 2 Press Esc Shift+v Shift+f. This hides the headers, footers, margins, page breaks, and any background graphics; removes multicolumn formatting; and makes the document view-only.
- 3 Close the document, and when an alert message prompts you to save the document, click Save.

When you save the document in FluidView format and then reopen it, the main text flow (usually tagged A) will always appear, even if a different text flow was visible when you changed the document to FluidView format. However, when you click an active area that points to another flow, the new flow appears in the FluidView document.

### To change a FluidView document back to Document format:

Press Esc Shift+f l (lowercase L) k.

### To restore margins, headers, and footers to a FluidView document but keep it view-only:

Press Esc Shift+v Shift+f.

## Creating documents for use in FluidView format

Keep in mind the following points as you create FluidView documents:

- When users open a FluidView document that contains more than one text flow, the main flow always appears in the document window. However, you can create links to other flows in the document. When a user clicks an active area that points to another flow, the new flow appears in the FluidView document.
- Although a FluidView document may be as long as any FrameMaker document, try to keep the length of each document under 200 inches. A page break will appear every 200 inches, and footnotes and graphic frames anchored at the bottom of a column will appear at these page breaks instead of at the end of the document.

- Set anchored frames in your document to one of three anchoring positions: Below Current Line, At Insertion Point, or Run into Paragraph. Frames anchored at positions other than these may produce unexpected results.
- You can change the view-only window display or selectively disable menu commands. These expert controls are available through a Maker Interchange Format (MIF) file. For information on using MIF to set up the view-only window, see the online manual *MIF Reference*.

### **Changing side-head area setup**

You can use side heads in one format and not in the other. For example, you can display headings in the side-head area in FluidView and in the body-text area in the printed copy.

#### **To set up different side-head areas in Document format and FluidView format:**

- 1 Use Format > Page Layout > Column Layout to turn side-head formatting on or off while the document is in Document format (see "Creating side heads" on page 109).
- 2 Press Esc Shift+v Shift+f to change the document to FluidView format.
- 3 Press Esc j p Shift+s to turn side-head formatting on or off in FluidView. For information on setting up side heads, see "Formatting text as headings" on page 109.

